Travel Activities & Motivation Survey

Emergent Vacation Interests

April, 2002

TAMS
Travel Attitudes &
Motivation Survey

Travel Activities & Motivation Survey

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Table of Contents

Executive Summary viii

Introduction

Background 10
Emergent Vacation Activities: Method 11
Lifespan Segmentation Descriptions 12

Emergent Vacation Experiences

Emergent Vacation Experiences: Method 17
Vacation Experiences More Likely To Be Sought In Next Two Years Than In Past Two Years 18
Vacation Experiences As Likely To Be Sought In Next Two Years As In Past Two Years 19
Change in Percent Likely To Do: Next Two Years vs. Past Two Years 20
Increased Interest in Vacation Intimacy and Romance 21
Increased Interest in Experiencing Different Cultures and Ways of Life 22
Increased Interest in Seeing Natural Wonders and Sites 23
Increased Interest in The Good Life (Pampering) 24
Increased Interest in Adventure and Excitement 25
Increased Interest in Unspoiled Nature 26
Increased Interest in Historical Sites 27
Increased Interest in Hands-On Learning Experiences 28
Increased Interest in Hobby or Sports While On Vacation 29
Vacation Experiences Most Likely To Be Sought Out: By Segment 30

Table of Contents

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Emergent Outdoor Vacation Activities

Outdoor Activities While Travelling: Method	35
Outdoor Activities More Likely To Be Sought During Travel in Next Two Years Relative To Past Two Years	36
Outdoor Activities As Likely To Be Sought During Travel in Next Two Years As During Past Two Years	39
Change in Percent Likely To Do: Next Two Years vs. Past Two Years	41
See Northern Lights or Other Arctic Experience	42
Go Horseback Riding	43
Go Whitewater Rafting	44
Go Scuba Diving	45
Go Hot Air Ballooning	46
Go Downhill Skiing	47
Go Whale Watching	48
Go Canoeing or Kayaking	49
Go Swimming in an Ocean	50
Snowmobiling (On Organized Trail)	51
Recreational Biking	52
Top 12 Emergent Outdoor Activities: By Market Segment	53

Table of Contents

Emergent Cultural and Entertainment Vacation Activities

Cultural and Entertainment Activities While Travelling: Method 66
Cultural and Entertainment Activities More Likely To Be Sought In Next Two Years Than In Past Two Years 67
Cultural and Entertainment Activities As Likely To Be Sought In Next Two Years As During Past Two Years 70
Change in Percent Likely To Do: Next Two Years vs. Past Two Years 72
Natural Sites Like Niagara Falls 73
Science and Technology Theme Parks 74
Carnivals (e.g., Mardi Gras) 75
Movie Theme Parks Like MGM 76
Amusement Parks Like Disneyland 77
French-Canadian Cultural Experiences 78
Music Festivals Like Montreal Jazz Festival 79
Historical Sites Like Fort Alamo 80
Garden Attractions Like Cypress Gardens 81
Historical Replicas with Re-enactments 82
Top 12 Emergent Cultural and Entertainment Activities: By Segment 83

Table of Contents

Emergent Activity-Related Accommodations Vacation Activities

Activity-Related Accommodations: Method 96
Activity-Related Accommodations More Likely To Be Stayed In During Next Two Years Relative To Past Two Years 97
Activity-Related Accommodations As Likely To Be Stayed In During Next Two Years As During Past Two Years 99
Change in Percent Likely To Stay: Next Two Years vs. Past Two Years 100
Bed-and-Breakfast 101
Lakeside Resort in Summer 102
Health Spa 103
Ski or Mountain Resort in Winter 104
Wilderness Lodge (Vehicle Accessible) 105
Seaside Resort in Summer 106
Private Cottage or Condo You Rent 107
Camping in Wilderness Setting 108
Work Farm or Guest Ranch 109
Remote Fly-in Outpost 110
Top 8 Emergent Activity-Related Accommodations: By Segment 111

Table of Contents

Emergent Touring Vacation Activities

Touring and Cruising Sought and Will Seek: Method 124
Overnight/Day Tours/Cruises More Likely In Next Two Years Relative To Past Two Years 125
Overnight/Day Tours/Cruises As Likely In Next Two Years As During Past Two Years 126
Change in Percent Likely To Take Tour: Next Two Years Versus. Past Two Years 127
Ocean Cruises 128
Scenic Day Tours By Train 129
Overnight Scenic Tours of Countryside 130
Overnight Great Lakes Cruises 131
Day Visits to Wineries for Tastings 132
Overnight Tours of Wine Regions 133
Top Emergent Touring/Cruising Activities: By Market Segment 134

For Technical Appendices, please go to: www.tourism.gov.on.ca

Emergent Vacation Interests

- Key Findings -

Travellers who had taken at least one trip during the last two years and planned to take at least one trip during the next two years were asked which of 149 activities and which of 18 vacation experiences they had sought out or participated in over the past two years while travelling. They also were asked which of these same activities or experiences they expected to seek out or participate in during the next two years of travel. The extent to which any given activity or experience was more likely to be pursued during the next two years of travel relative to the last two years was used as a gauge of the extent to which the experience or vacation activity was an emergent interest. Emergent vacation interests are activities or experiences which are inherently appealing, and therefore excellent candidates for tourism promotional activity.

Travellers were significantly more likely to seek out 10 of the 18 vacation experiences during the next two years relative to the past two years. They especially exhibited an emergent interest in intimate and romantic vacation experiences, suggesting that this type of vacation is the most likely to exhibit growth over the next two years. Travellers also manifested emergent interests in seeking out different cultures and ways of life, seeing important natural sites, indulging on fine cuisine and experiencing unspoiled nature.

Forty (out of 57) outdoor vacation activities were significantly more likely to be pursued on future trips relative to the last two years of travel. The most pronounced emergent outdoor interests were often the more unusual or exotic activities such as having an Arctic experience, whitewater rafting, scuba diving, hot air ballooning, snowmobiling and whale watching. This outcome suggests that travellers may be especially responsive to promotional activities which present novel outdoor activities and experiences.

Twenty-nine (out of 57) culture and entertainment activities were significantly more likely to be pursued on future trips relative to the last two years of travel. Visiting natural wonders such as Niagara Falls was the most pronounced emergent vacation interest in this category. Other emergent culture and entertainment interests included visits to theme parks (e.g., science and technology, amusement parks, movie theme parks), attending carnivals such as the Mardi Gras or music festivals such as the Montreal Jazz festival, visits to historical sites or historical replicas with re-enactments, and a desire to experience French-Canadian culture.

Travellers reported being more likely to take eight of the 13 overnight and day tours during the next two years of travel relative to the past two years. Ocean cruises were the most pronounced emergent tour type, although scenic day tours by train, overnight scenic bus tours of the countryside and Great Lakes cruises were also strong emergent touring interests. Travellers also showed emergent interest in bed-and-breakfasts, lakeside resorts, health spas, ski resorts or mountain resorts, and wilderness lodges accessible by car.

Section One
Introduction

Background

An association of Canadian tourism ministries and organizations have collaborated to conducted two large-scale surveys to assess the travel activities and motivators of pleasure travel among Canadians and Americans.

This survey, known as the *Travel Activities and Motivation Survey* (TAMS), represents the comprehensive assessment of travel behavior and motivators. It provides a rich and authoritative database by which to develop marketing strategies and travel products to attract visitors to Canada and Ontario.

A series of analyses are being conducted using the TAMS database to explore the travel patterns of the marketplace as well as the factors which motivate travel behavior. The TAMS database consisted of a telephone survey and a self-completed mailback survey. The survey was conducted in Canada and the United States between September 27, 1999 and April 16, 2000. The telephone survey was completed by 28,397 individuals in the United States and by 18,385 individuals in Canada. Respondents were selected randomly within the household. People participating in the telephone survey who had travelled in the past two years or expressed interest in travel in the next two years were asked to complete a mailback questionnaire. Overall, 40,271 qualified for the mailback questionnaire. Of these, 11,892 (29.4 percent) returned usable questionnaires. The response rate was higher in Canada with 5,490 (35.2 percent) returning the questionnaire, while 6,405 (26.0 percent) of the American respondents returned the questionnaire.

This current study is intended to identify vacation activities and vacation experiences which are more likely to be pursed within the next two years than during the past two years. These activities and vacation experiences may be referred to as "emergent vacation interests" because they provide insight into possible activities which are more likely to be pursued in future travel activities.

Five types of emergent vacation interests are explored in this report:

a) Emergent Vacation Experiences

b) Emergent Outdoor Activities

c) Emergent Culture and Entertainment Interests

d) Emergent Activity-Related Accommodations

e) Emergent Touring Activities

Emergent Vacation Activities

Research Method

In the TAMS Mailback survey, those who had taken at least one trip during the last two years and planned to take at least one trip during the next two years were asked which of 149 activities and which of 18 vacation experiences:

- They had sought out or participated in over the past two years of travel
- They planned to seek out or participate in during the next two years of travel.

The extent to which any given activity or vacation experience was more likely to be pursued during the next two years relative to the last two years was determined by subtracting the percent who stated that they had pursued a given activity in the past two years from the percent who stated that they were likely to pursue the vacation interest over the course of the next two years. If this value is positive, it signified that the vacation interest was more likely to be pursued within the next two years than during the past two years. On the other hand, if the value was negative it meant that the vacation interest was less likely to be pursued over the course of the next two years than during the last two years.

This reports also examines which segments of the travel market are the most 'more likely' to pursue various emergent vacation interests over the course of the next two years relative to the last two years. This information has been provided by the 12 market segments used throughout the TAMS report series. A definition of each of these segments is provided on the following pages.

Lifespan Segmentation Descriptions

Youth Segments

The three Youth segments represent 20.3 percent of the total market. Two of these are classified as Affluent segments because of their household incomes and/or levels of education. These households are all under 35, do not have children, and are single or married couples.

Affluent Young Singles

- 5.9 percent of market; 6.5 percent of Canadian market; 5.8 percent of American market
- Lifecycle Stages: 100 percent young singles; 64.0 percent of respondents male
- Average Age: 25.3 years; Age Range: 54.5 percent 18 to 25; 45.5 percent 26 to 35
- Education: 67.7 percent university or college educated; 9.7 percent with advanced degrees (e.g., masters)
- Average household income: $72,000; Income Categories: 68.7 percent $40K to $80K; 31.3 percent $80K Plus

Affluent Young Couples

- 2.7 percent of market; 3.9 percent of Canadian market; 2.6 percent of American market
- Lifecycle Stages: 100 percent young couples; 42.8 percent of respondents male
- Average Age: 28.9 years; Age Range: 18.8 percent 18 to 25; 81.2 percent 26 to 35
- Education: 100 percent university or college educated; 17.8 percent with advanced degrees (e.g., masters)
- Average household income: $74,400; Income Categories: 66.2 percent $40K to $80K; 33.8 percent $80K Plus

Young Mainstream Market

- 11.8 percent of market; 13.2 percent of Canadian market; 11.6 percent of American market
- Lifecycle Stages: 73 percent young singles; 27 percent young couples; 56.9 percent of respondents male
- Average Age: 25.0 years; Age Range: 57.4 percent 18 to 25; 42.6 percent 26 to 35
- Education Level: 53 percent university/college educated; 4.5 percent with advanced degrees (e.g., masters)
- Average household income: $24,600; Categories: 93.3 percent less than $40K; 6.8 percent $40K to $80K

Lifespan Segmentation Descriptions

Family Segments

The three Family segments represent 36.2 percent of the total market. One of these is classified as an Affluent segment because of its household income and/or level of education. All of these households have children under 21 and are primarily married. The Mainstream Young Families have at least one child 12 or younger, while the Mainstream Mature Families have children between the ages of 13 and 21 (but no children 12 and under).

Affluent Families

- 6.6 percent of market; 5.8 percent of Canadian market; 6.7 percent of American market
- Lifecycle Stages: 69.9 percent young families; 26.4 percent mature families; 50 percent of respondents male
- Average Age: 41.2 years; Age Range: 23.9 percent under 35; 46.8 percent 36 to 45; 29.3 percent 46 and older
- Education: 100.0 percent university or college educated; 29.1 percent with advanced degrees (e.g., masters)
- Average household income: $107,400; Income Categories: 2.3 percent $40K to $80K; 97.7 percent $80K plus

Mainstream Young Families

- 23.0 percent of market; 20.1 percent of Canadian market; 23.4 percent of American market
- Lifecycle Stages: 100 percent families with children 12 or younger; 42.9 percent of respondents male
- Average Age: 35.3 years; Age Range: 52.8 percent under 35; 37.1 percent 36 to 45; 10.1 percent 46 and older
- Education: 50 percent university or college educated; 5.5 percent with advanced degrees (e.g., masters)
- Average household income: $42,800; Income Categories: 49.0 percent less than $40K; 51.0 percent $40K plus

Mainstream Mature Families

- 6.6 percent of market; 8.1 percent of Canadian market; 6.4 percent of American market
- Lifecycle Stages: 100 percent families with children between 13 and 21; 45.1 percent of respondents male
- Average Age: 45.3 years; Age Range: 7.8 percent under 35; 47.6 percent 36 to 45; 44.6 percent 46 and older
- Education Level: 47 percent university/college educated; 5.5 percent with advanced degrees (e.g., masters)
- Average household income: $48,200; Income Categories: 37.9 percent less than $40K; 62.1 percent $40K plus

Lifespan Segmentation Descriptions

Mature Segments

The three Mature segments represent 30.4 percent of the total market. One of these is classified as an Affluent segment because of its household income and/or level of education. These households are all between 36 and 64 and do not have children. (Note: 3.8 percent of the Mature market has been classified with seniors in the Affluent Mature and Senior Couples).

Affluent Mature Singles

- 5.1 percent of market; 2.4 percent of Canadian market; 5.4 percent of American market
- Lifecycle Stages: 100 percent mature singles (36 to 65); 58.1 percent of respondents male
- Average Age: 48.5 years; Age Range: 40.2 percent 36 to 45; 37.6 percent 46 to 55; 22.2 percent 56 to 65
- Education: 100 percent university or college educated; 26.5 percent with advanced degrees (e.g., masters)
- Average household income: $71,000; Income Categories: 72.8 percent $40K to $80K; 27.2 percent $80K plus

Mainstream Mature Couples

- 12.8 percent of market; 18.0 percent of Canadian market; 12.3 percent of American market
- Lifecycle Stages: 100 percent mature couples (36 to 65); 52.1 percent of respondents male
- Average Age: 52.1 years; Age Range: 23.4 percent 36 to 45; 38.4 percent 46 to 55; 38.2 percent 56 to 65
- Education: 48 percent university or college educated; 6.0 percent with advanced degrees (e.g., masters)
- Average household income: $49,600; Income Categories: 34.1 percent less than $40K; 59.8 percent $40K plus

Mainstream Mature Singles

- 8.6 percent of market; 6.8 percent of Canadian market; 8.9 percent of American market
- Lifecycle Stages: 73 percent mature singles (36 to 65); 58.1 percent of respondents male
- Average Age: 50.2 years; Age Range: 35.0 percent 36 to 45; 34.0 percent 46 to 55; 31.1 percent 56 to 65
- Education Level: 42 percent university/college educated; 3.9 percent with advanced degrees (e.g., masters)
- Average household income: $28,800; Income Categories: 84.0 percent less than $40K; 16.0 percent $40K plus

Lifespan Segmentation Descriptions

Mature/Seniors Segments

The three Mature/Senior segments represent 16.8 percent of the total market. One of these segments is classified as an Affluent segment because of its household income and/or level of education. The Affluent Mature and Senior Couples are primarily (85 percent) from the Mature market, while the Mainstream Senior Couples and Senior Singles are all over 66 years old.

Affluent Mature and Senior Couples

- 4.5 percent of market; 3.5 percent of Canadian market; 4.7 percent of American market
- Lifecycle Stages:85 percent mature couples (35 - 65); 15 percent senior couples (66 plus); 54.6 percent male
- Average Age: 54.5 years; Age Range: 21.0 percent 36 to 45; 37.3 percent 46 to 55; 41.7 percent 56 plus
- Education: 100 percent university or college educated; 30.8 percent with advanced degrees (e.g., masters)
- Average household income: $108,600; Income Categories: 100 percent $80K plus

Mainstream Senior Couples

- 5.0 percent of market; 6.5 percent of Canadian market; 4.8 percent of American market
- Lifecycle Stages: 100 percent senior couples (66 plus); 56.1 percent of respondents male
- Average Age: 72.7 years; Age Range: 100 percent 66 plus
- Education: 42.4 percent university or college educated; 5.8 percent with advanced degrees (e.g., masters)
- Average household income: $37,900; Income Categories: 57.4 percent Less than $40K; 42.6 percent $40K plus

(Affluent and Mainstream) Senior Singles

- 7.3 percent of market; 5.1 percent of Canadian market; 7.5 percent of American market
- Lifecycle Stages: 100 percent senior singles; 35.6 percent of respondents male
- Average Age: 74.9 years; Age Range: 100 percent 66 plus
- Education Level: 43 percent university/college educated; 8.0 percent with advanced degrees (e.g., masters)
- Average household income: $28,600; Income Categories: 78.7 percent Less than $40K; 21.3 percent $40K plus

Section Two

Emergent Vacation Experiences

Emergent Vacation Experiences

- Research Method -

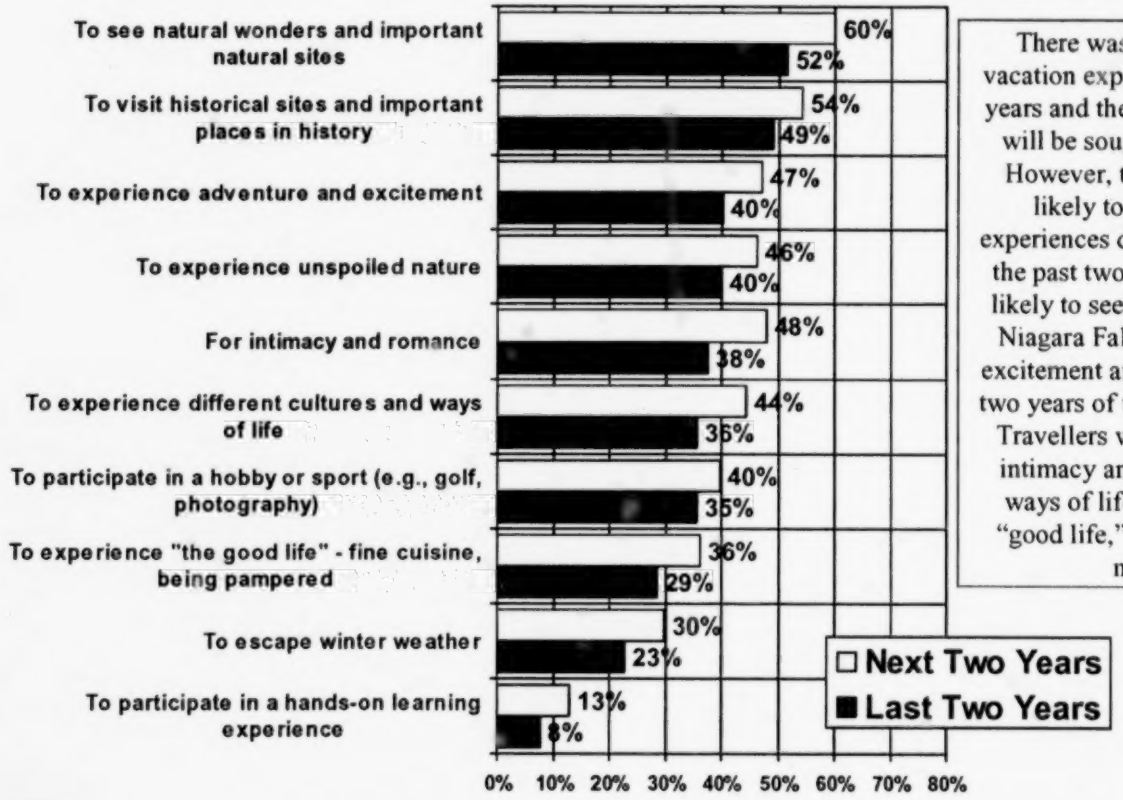
Those who took an overnight trip during the last two years and planned to take an overnight trip during the next two years were asked to indicate which of 18 vacation experiences they had sought over the course of the last two years of travel and which they were likely to seek out over the course of the next two years of travel. The difference in the percent who had pursued each vacation experience and the percent who planned to pursue the vacation experience was used as a gauge of the extent to which the vacation experience was emergent (i.e., more likely to occur in the next two years than the last two years).

The vacation experiences examined in this section of the report were as follows:

- To rest, relax and recuperate
- To spend quality time with the family away for home
- To visit friends or relatives who live in another city or country
- For intimacy and romance
- To experience different cultures and ways of life
- To visit historical sites and important places in history
- To spend time with a group of good friends
- To see natural wonders and important natural sites
- To experience "the good life" - fine cuisine, good wine, being pampered
- To visit casinos and gamble
- To visit a popular, trendy place
- To be someplace that feels familiar and safe
- To experience adventure and excitement
- To experience city life (e.g., nightlife, shopping, museums)
- To escape winter weather
- To experience unspoiled nature
- To participate in a hobby or sport (e.g., golf, fishing, photography)
- To participate in a hands-on learning experience (e.g., archaeological digs, cooking courses)

Vacation Experiences More Likely To Be Sought In Next Two Years Than In Past Two Years

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)



There was considerable consistency in the vacation experiences sought during the past two years and the types of vacation experiences that will be sought out during the next two years. However, travellers were significantly more likely to seek out 10 of the 18 vacation experiences during the next two years relative to the past two years. They were especially more likely to seek out natural wonders (e.g., seeing Niagara Falls), historical sites, adventure and excitement and unspoiled nature during the next two years of travel relative to the past two years. Travellers will also be more likely to look for intimacy and romance, different cultures and ways of life, opportunities to experience the "good life," and hands-on learning during the next two years of travel.

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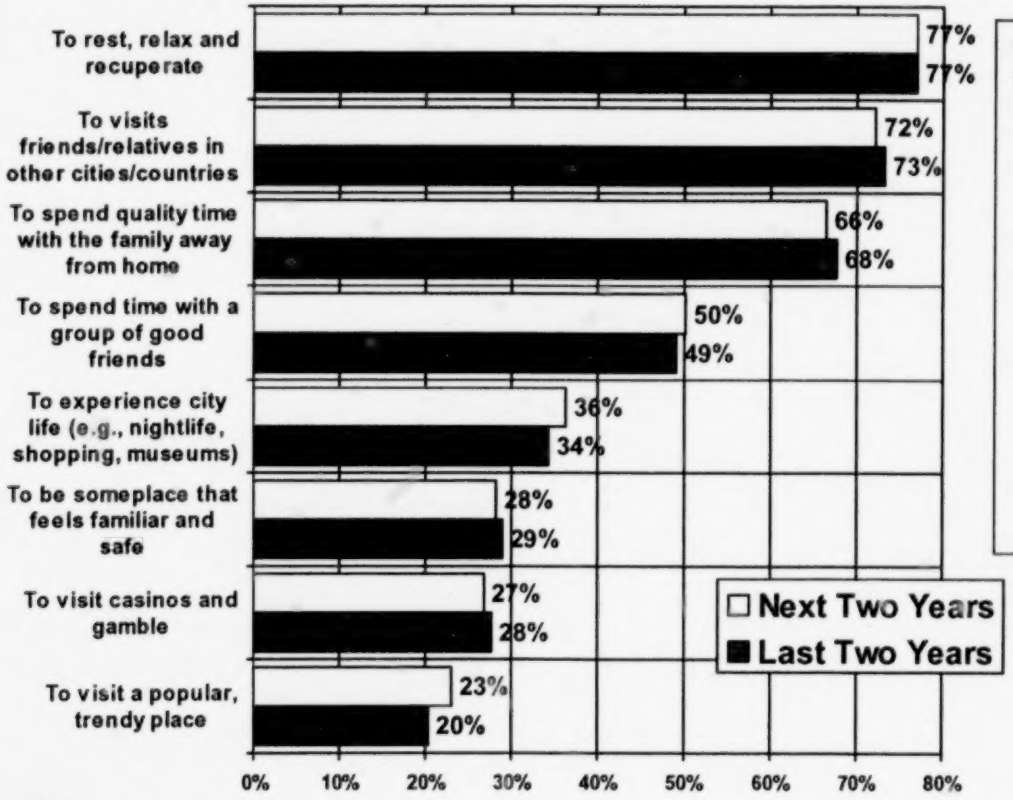
TAMS: Emergent Vacation Interests

Vacation Experiences As Likely To Be Sought In Next Two Years As In Past Two Years

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)

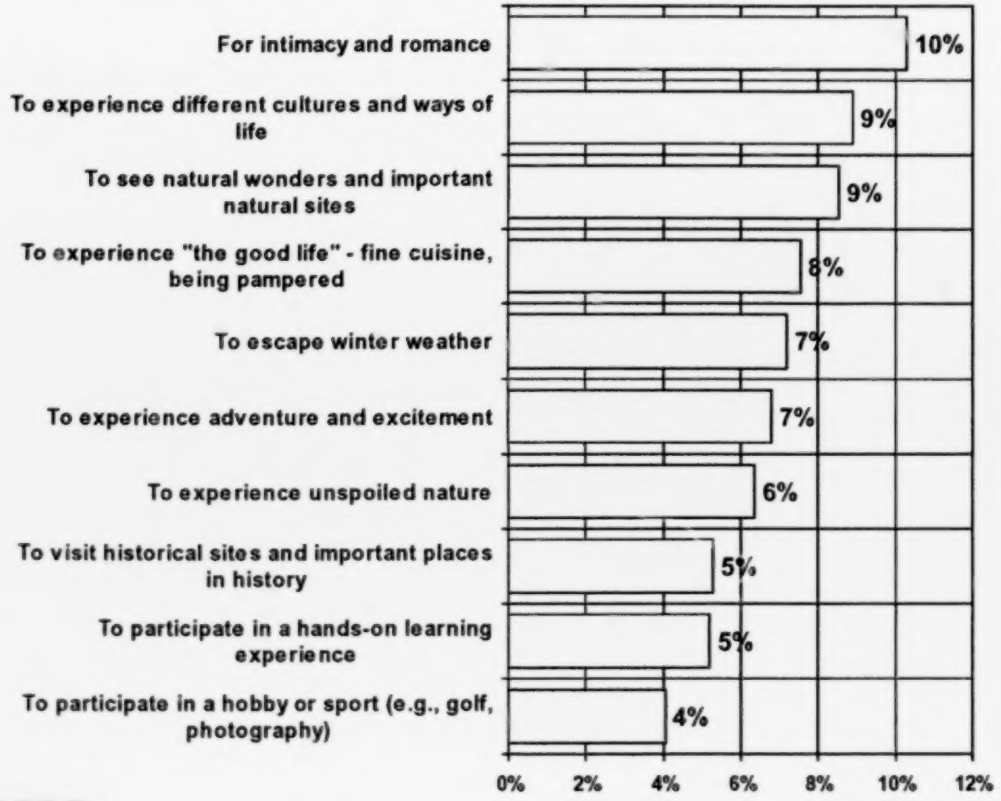


Eight of the 18 vacation experiences were no more likely to be pursued during the next two years than during the past two years. These tend to be common and less exotic vacation experiences such as resting and relaxing, visiting friends and family, or spending quality time with friends or family members. There was also no discernable change in the percent who expected to seek out city life (night clubs, museums), casinos, trendy popular places, or places that were safe and familiar. While the incidence with which these vacation experiences will be pursued did not decline relative to past travel, it is clear that the pursuit of such experiences is less likely to change in the near future.

Vacation Experiences More Likely to be Sought in Next Two Years Than Past Two Years

Change In Percent Likely To Do: Next Two Years Versus Past Two Years

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)



Relative to the past two years, travellers were most likely to exhibit an increase interest in intimate and romantic vacation experiences, suggesting that this type of vacation is the most likely to exhibit growth over the next two years. Travellers can also be expected to be more likely to seek out different cultures and ways of life and important natural sites during the next two years of travel. Fine cuisine, adventure and excitement and a desire to experience unspoiled nature are also likely to be more common vacation pursuits during the next two years relative to the past two years.

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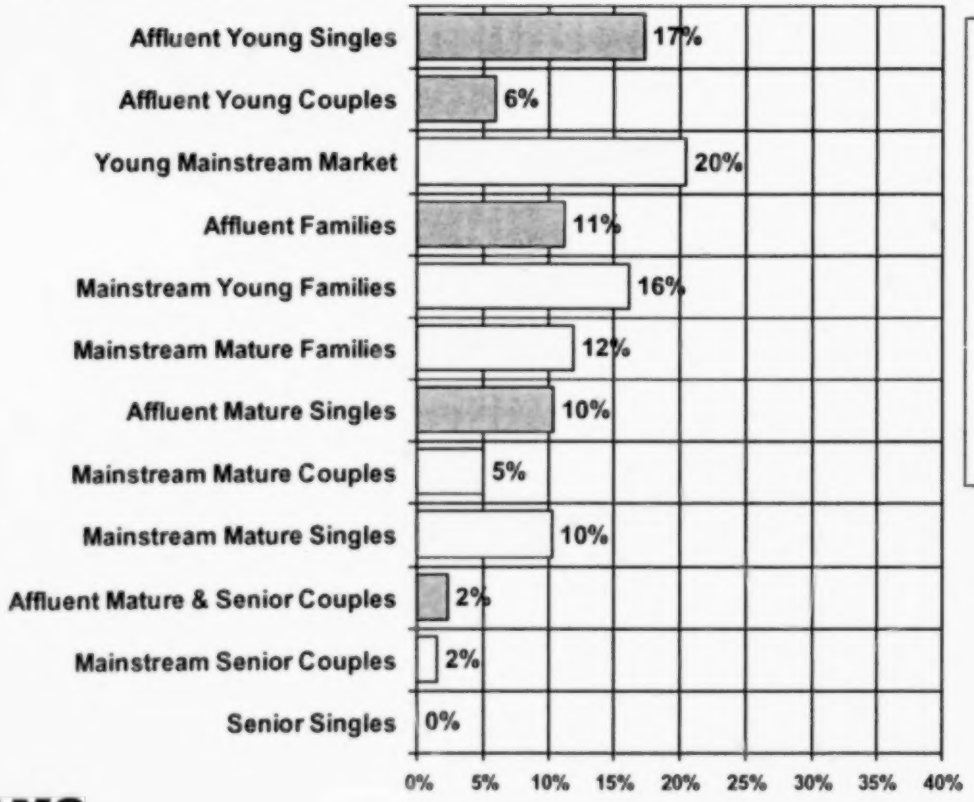
TAMS: Emergent Vacation Interests

Percent Net Change in Those Having Sought Out Experience in Past Two Years
Relative to Those Likely to Seek Out Experience in Next Two Years

Increased Interest in Vacation Intimacy and Romance

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and
Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)

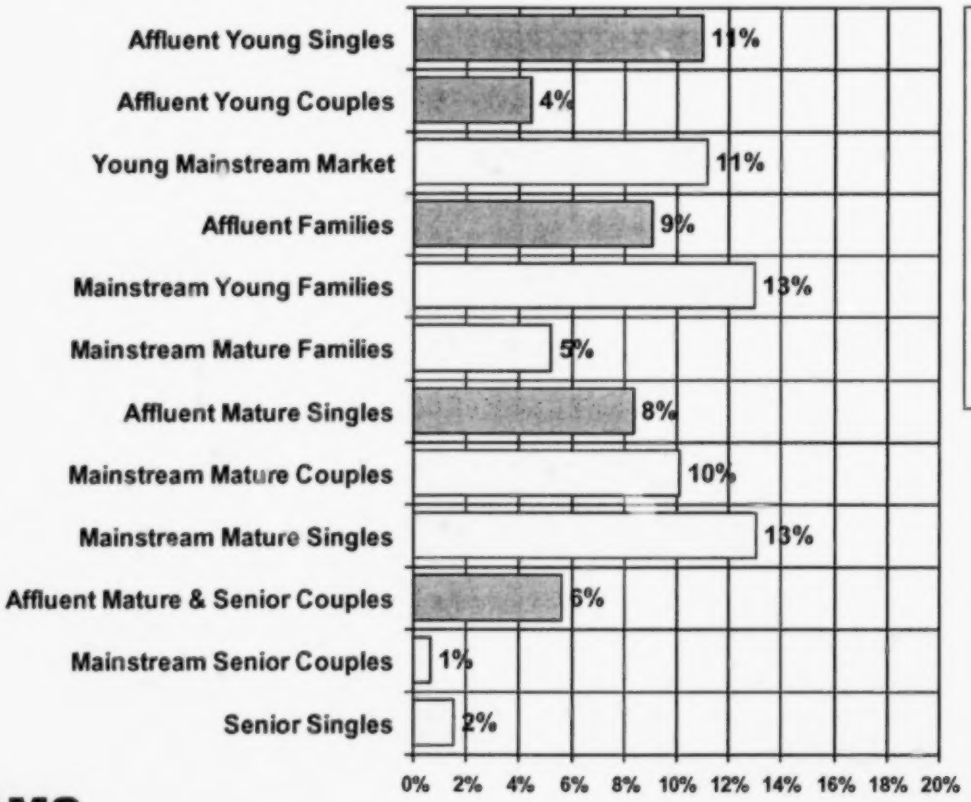


Younger travellers, and those from the Family segments, were the most likely to exhibit an increased interest in vacations that offer an opportunity for intimacy and romance. Those from the Young Mainstream Market and the Affluent Young Singles, which are segments with a high incidence of singles, were the most likely to exhibit increased interest in intimate and romantic vacation experiences. The Young Mainstream Family segment, which are families with children under the age of 13, also were more likely to exhibit an interest in this type of vacation pursuit.

Percent Net Change in Those Having Sought Out Experience in Past Two Years
Relative to Those Likely to Seek Out Experience in Next Two Years

Increased Interest in Experiencing Different Cultures and Ways of Life

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and
Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)



Increased interest in experiencing different cultures and ways of life over the course of the next two years of travel was more likely within the Mainstream markets (yellow bars) than in the Affluent markets (aqua bars). Mainstream Young Families and Mainstream Mature Singles were especially likely to express increased interest in such vacation pursuits relative to past vacation experiences. This is partially related to the fact that these segments were less likely to have pursued this type of vacation experience during the past two years of travel.

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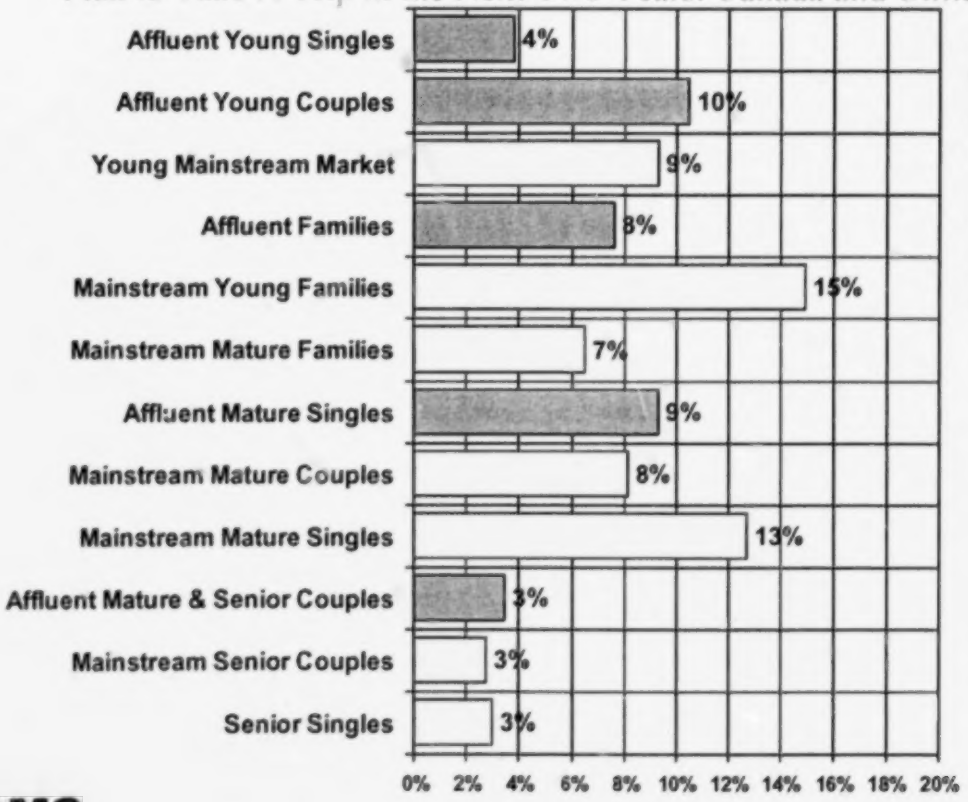
TAMS: Emergent Vacation Interests

Percent Net Change in Those Having Sought Out Experience in Past Two Years
Relative to Those Likely to Seek Out Experience in Next Two Years

Increased Interest in Seeing Natural Wonders and Sites

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and
Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)



Increased interest in seeing natural sites and wonders (e.g., Niagara Falls) during the next two years (relative to the last two years) was also more likely among Mainstream Young Families and Mainstream Mature Singles. Once again, these two segments were less likely to have pursued this type of vacation experience during the past two years.

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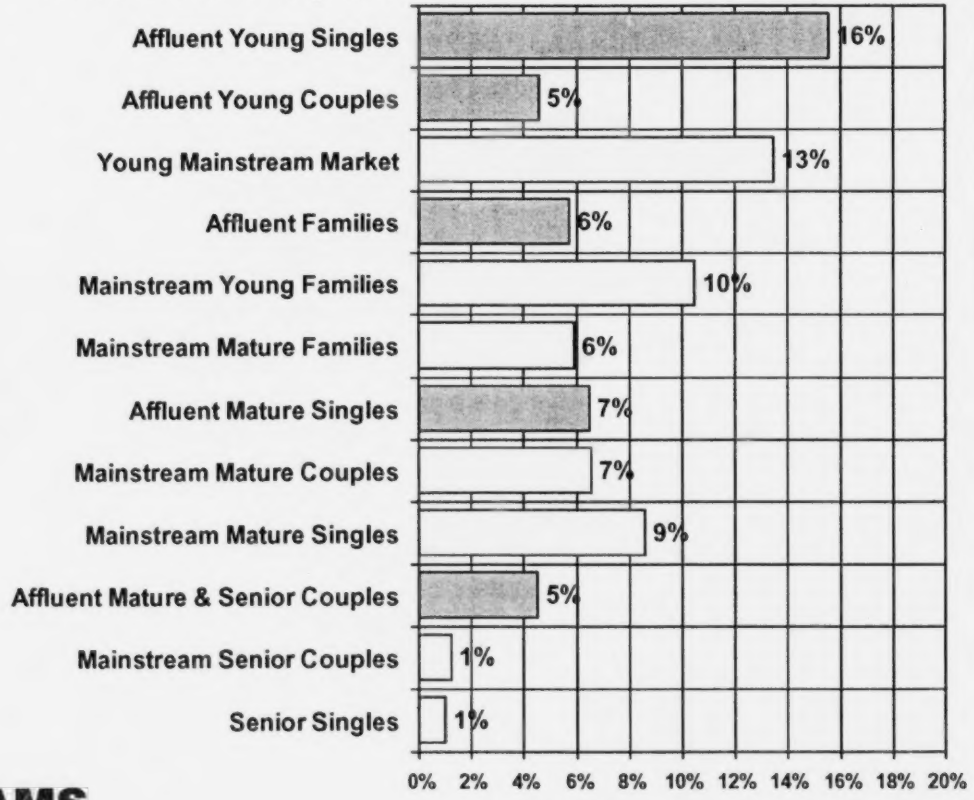
Percent Net Change in Those Having Sought Out Experience in Past Two Years
Relative to Those Likely to Seek Out Experience in Next Two Years

Increased Interest in The Good Life (Pampering)

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and
Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)

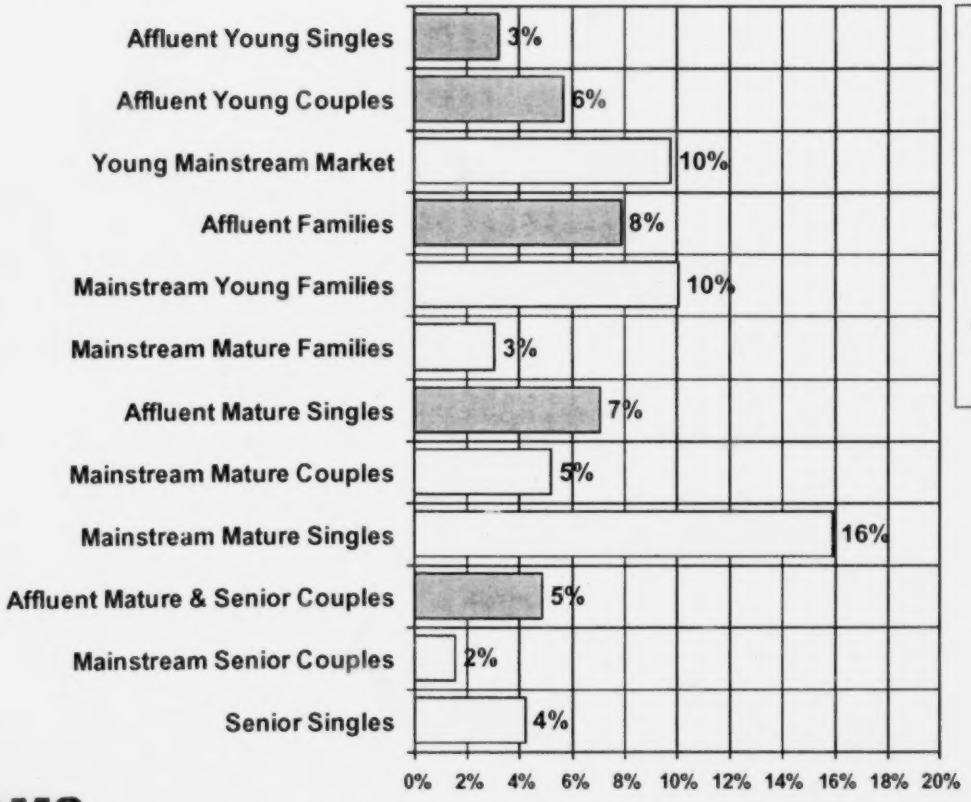


Affluent Young Singles and the Young Mainstream Market were the most likely to exhibit an increased interest in experiencing "the good life" (e.g., fine dining, nightlife) while on vacation during the course of the next two years. Mainstream Young Families also were more likely to pursue "the good life" while on vacation during the next two years relative to the past two years of travel

Percent Net Change in Those Having Sought Out Experience in Past Two Years
Relative to Those Likely to Seek Out Experience in Next Two Years

Increased Interest in Adventure and Excitement

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and
Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)



Mainstream Mature Singles were the most likely to indicate that they were more likely to pursue adventure and excitement while on vacation during the next two years. The Young Mainstream Market, Affluent Families and Mainstream Young Families also were more likely to seek out adventure and excitement while on vacation during the next two years. The heightened interest among travellers with small children (under the age of 12) suggests that these sectors of the market may have a pent-up demand for more excitement in their vacations.

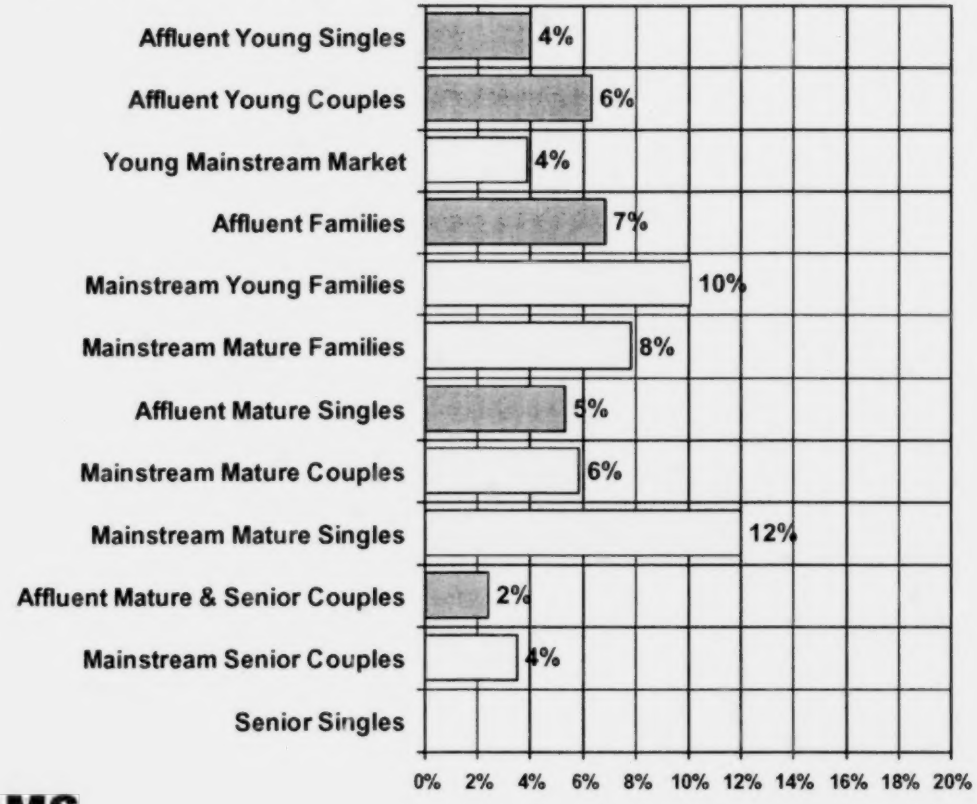
TAMS
Travel Activities & Motivation Survey

TAMS: Emergent Vacation Interests

Percent Net Change in Those Having Sought Out Experience in Past Two Years
Relative to Those Likely to Seek Out Experience in Next Two Years

Increased Interest in Unspoiled Nature

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and
Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)



Increased interest in experiencing unspoiled nature is also more likely within the Mainstream Mature Single segment. Mainstream Young Families are also somewhat more likely to pursue opportunities to experience unspoiled nature during the next two years relative to the past two years of travel.

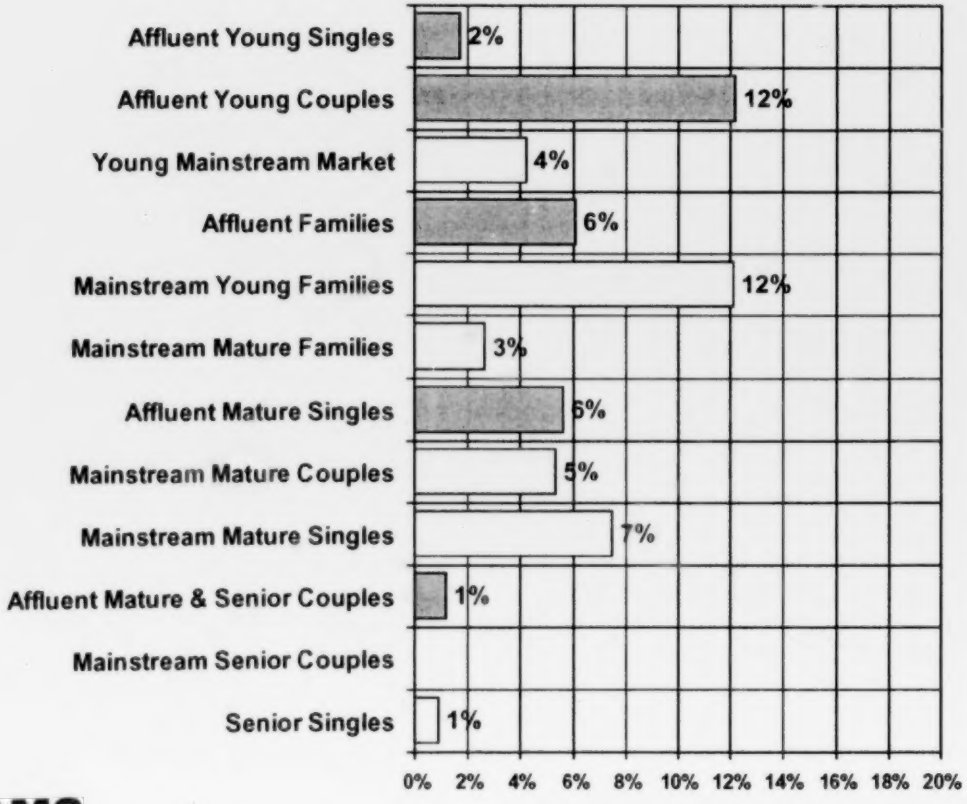
TAMS
Travel Activities & Motivation Survey

TAMS: Emergent Vacation Interests

Percent Net Change in Those Having Sought Out Experience in Past Two Years
Relative to Those Likely to Seek Out Experience in Next Two Years

Increased Interest in Historical Sites

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and
Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)

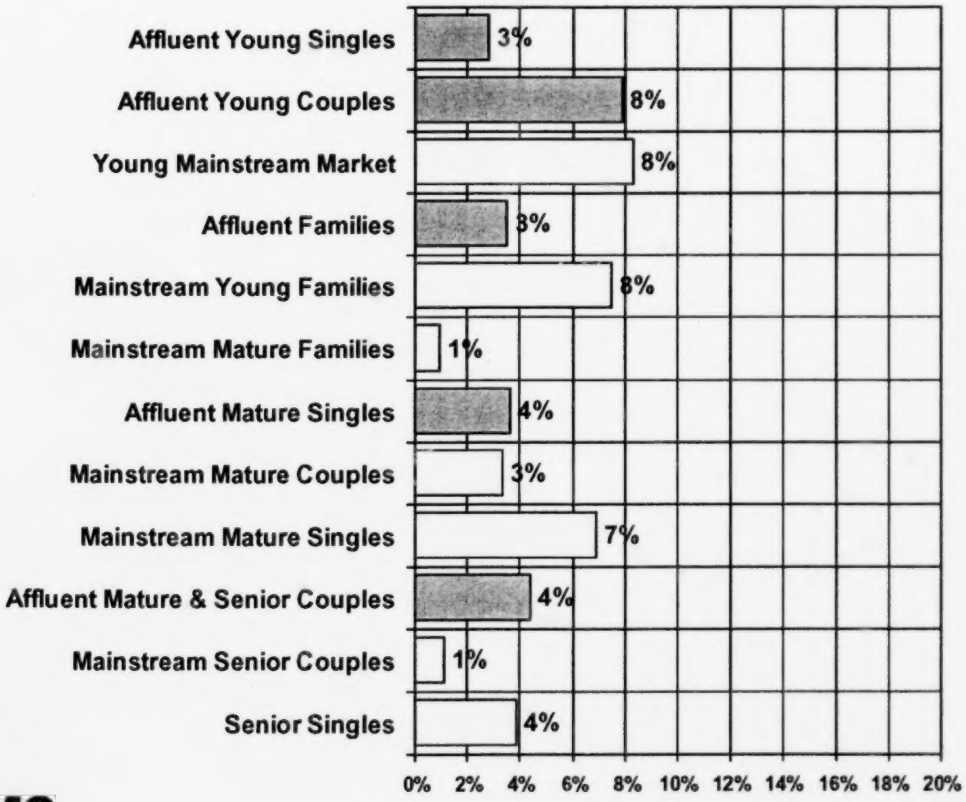


Affluent Young Couples, who are among the most frequent travellers in the market, were among the most likely to exhibit an increased interest in seeing historical sites and important places in history. Mainstream Young Families also were more likely to exhibit an increased interest in visiting historical sites and places of historical importance during the next two years.

Percent Net Change in Those Having Sought Out Experience in Past Two Years
Relative to Those Likely to Seek Out Experience in Next Two Years

Increased Interest in Hands-On Learning Experiences

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and
Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)



Increased interest in having a hands-on learning experience while on vacation over the course of the last two years was more likely to be observed among the younger segments such as Affluent Young Couples, the Young Mainstream Market and Mainstream Young Families. This is consistent with the fact that younger travellers seem more interested in using their vacations as opportunities to learn and acquire new skills. This type of vacation experience was also more likely among the Mainstream Mature Singles.

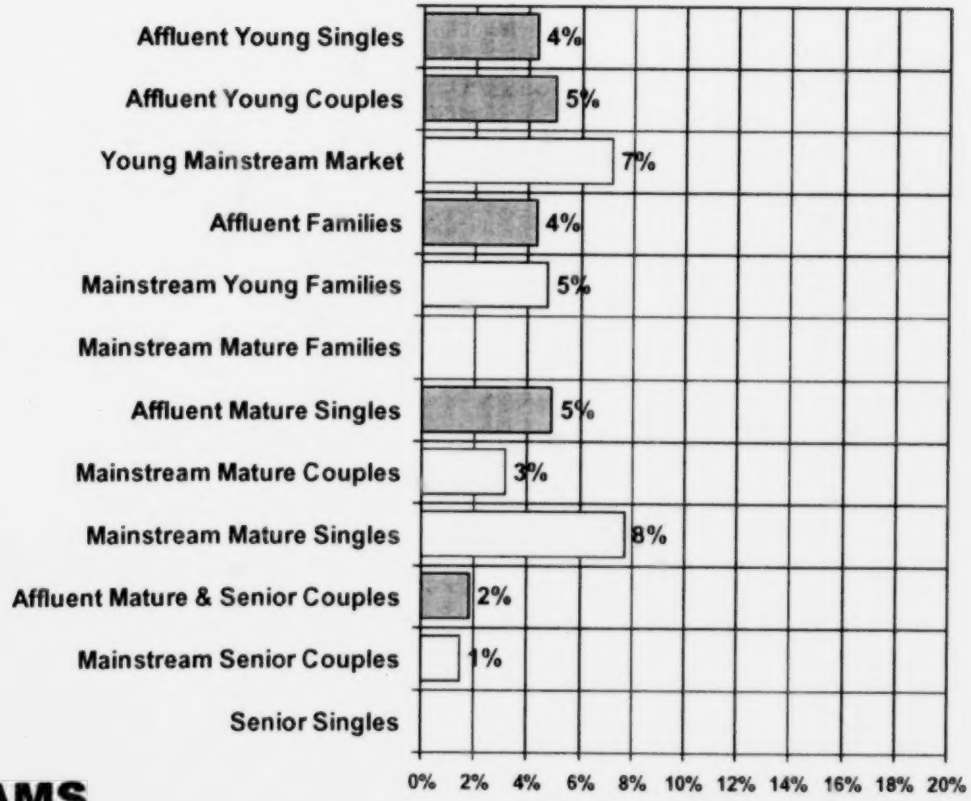
TAMS
Travel Activities & Motivation Survey

TAMS: Emergent Vacation Interests

Percent Net Change in Those Having Sought Out Experience in Past Two Years
Relative to Those Likely to Seek Out Experience in Next Two Years

Increased Interest in Hobby or Sport While On Vacation

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and
Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)



TAMS: Emergent Vacation Interests

The Mainstream Mature Singles were the most likely to exhibit an increased interest in pursuing a hobby or sport while on vacation during the next two years. However, the increased interest in such vacation pursuits is relatively constant across the Youth, Family and Mature segments. The one exception to this is observed for the Mainstream Mature Families, who exhibited no emergent interest in pursuing a hobby or sport over the course of the next two years of travel.

Vacation Experiences Most Likely to Be Sought Out in Next Two Years
Relative to Past Two Years

Youth Segments

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and
Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)

The two Youth segments with a high incidence of singles (i.e., Affluent Young Singles, Young Mainstream Market) were most likely to report increased interested in intimate and romantic vacations. This may reflect a desire for people in these segments to find a romantic partner to travel with. These two segments were also interested in experiencing "the good life" as well as different cultures and ways of life. Affluent Young Couples, on the other hand, exhibit greater interest in opportunities to learn while on vacation, including visiting historical sites and places of historical significance, seeing natural wonders and important natural sites, and participating in hands-on learning experiences.

Affluent Young Singles:	For intimacy and romance (17.3 percent net change)
	The good life, fine cuisine, good wines, being pampered (15.5 percent net change)
	To experience different cultures and ways of life (11.0 percent net change)
Affluent Young Couples:	To visit historical sites and important places in history (12.2 percent net change)
	To see natural wonders and important natural sites (10.5 percent net change)
	To participate in a hands-on learning experience (7.9 percent net change)
Young Mainstream Market:	For intimacy and romance (20.4 percent net change)
	The good life, fine cuisine, good wines, being pampered (13.5 percent net change)
	To experience different cultures and ways of life (11.2 percent net change)

Vacation Experiences Most Likely to Be Sought Out in Next Two Years
Relative to Past Two Years

Family Segments

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and
Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)

Mainstream Young Families, who tend to travel with small children, exhibit emergent interest in a wide array of vacation experiences during the next two years. This suggests that people in this segment may have been constrained in terms of the types of vacation experiences they have been able to seek, perhaps due to the logistical constraints of travelling with small children. Note that all three Family segments exhibit the greatest emergent interest in having intimate and romantic vacations, suggesting a pent-up need for more intimate experiences with their partners.

Affluent Families:
- For intimacy and romance (11.2 percent net change)
- To experience adventure and excitement (7.9 percent net change)
- To experience different cultures and ways of life (9.1 percent net change)

Mainstream Young Families:
- For intimacy and romance (16.1 percent net change)
- To see natural wonders and natural sites (14.9 percent net change)
- To experience different cultures and ways of life (13.0 percent net change)

Mainstream Mature Families:
- For intimacy and romance (11.9 percent net change)
- To experience unspoiled nature (7.8 percent net change)
- To see natural wonders and natural sites (6.6 percent net change)

Vacation Experiences Most Likely to Be Sought Out in Next Two Years
Relative to Past Two Years

Mature Segments

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and
Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)

The three Mature segments tend to view vacations as opportunities to explore new places. It is therefore not surprising that mature singles and couples exhibited increased interest in seeing natural wonders and experiencing different cultures and ways of life during the next two years relative to the last two years.

Affluent Mature Singles:

For intimacy and romance (10.4 percent net change)
To see natural wonders and natural sites (9.3 percent net change)
To experience different cultures and ways of life (8.4 percent net change)

Mainstream Mature Couples:

To experience different cultures and ways of life (10.3 percent net change)
To see natural wonders and natural sites (8.2 percent net change)
The good life, fine cuisine, wines, being pampered (6.6 percent net change)

Mainstream Mature Singles:

For adventure and excitement (15.9 percent net change)
To experience different cultures and ways of life (13.1 percent net change)
To see natural wonders and natural sites (12.7 percent net change)

Vacation Experiences Most Likely to Be Sought Out in Next Two Years
Relative to Past Two Years

Senior Segments

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and
Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)

The Affluent Mature and Senior Couples, as well as the two Senior segments, exhibited the least change in the vacation experiences sought in the past two years and the vacations that will likely be sought over the next two years. This suggests that these segments are currently in a position to pursue the types of vacation experiences they want while travelling.

Affluent Mature and Senior Couples:	For adventure and excitement (4.8 percent net change)
	The good life, fine cuisine, wines, being pampered (4.5 percent net change)
	To have a hands-on learning experience (4.4 percent net change)
Mainstream Senior Couples:	To experience unspoiled nature (3.5 percent net change)
	To see natural wonders and natural sites (2.7 percent net change)
	For intimacy and romance (1.5 percent net change)
Senior Singles:	For adventure and excitement (4.2 percent net change)
	To have a hands-on learning experience (3.9 percent net change)
	To see natural wonders and natural sites (3.0 percent net change)

Section Three

Emergent Outdoor Vacation Activities

Outdoor Activities While Travelling

- Research Method -

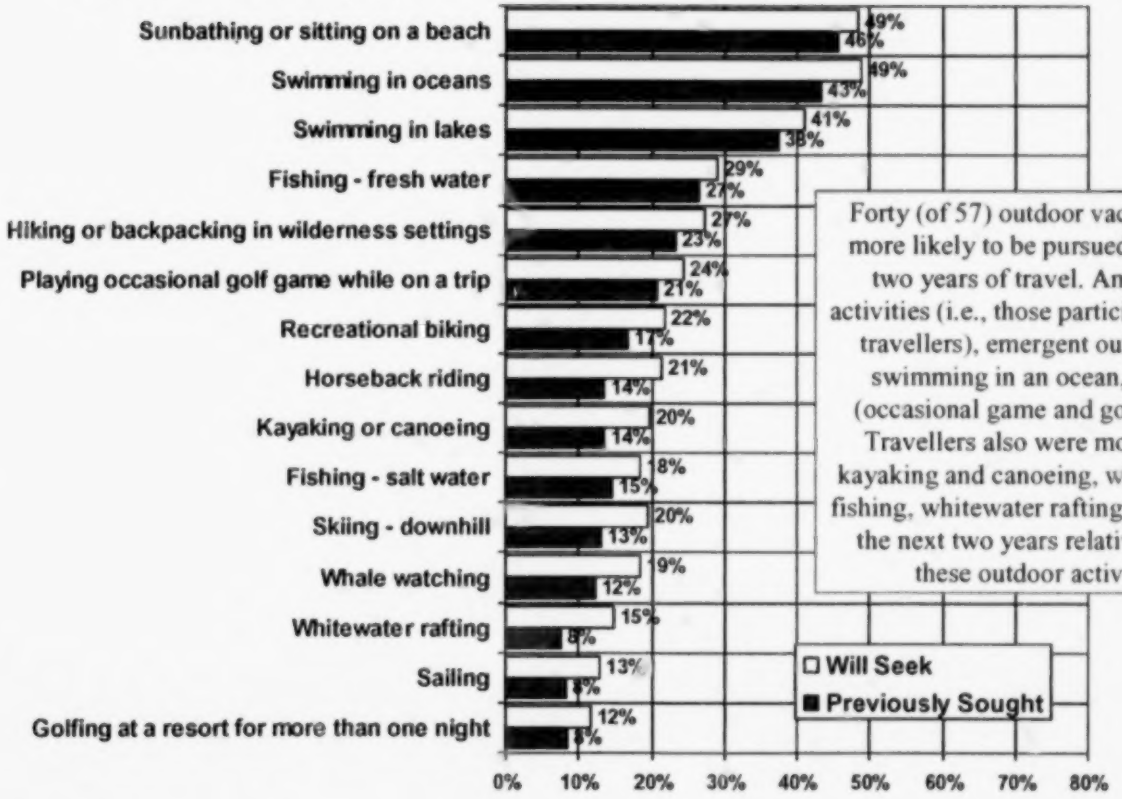
In the mailback survey, those who had taken a trip during the past two years were asked which of 59 outdoor activities they had participated in over the course of the last two years of travel.

They were also asked which of these same outdoor activities they were likely to pursue over the course of the next two years while travelling.

The difference in the percent who had pursued each type of outdoor vacation activity during the past two years and the percent who planned to participate in an outdoor vacation activity during the next two years was used as a gauge of the extent to which each outdoor vacation activity was an emergent interest.

Outdoor Activities More Likely To Be Sought During Travel In the Next Two Years Relative To Past Two Years (Part 1 of 3)

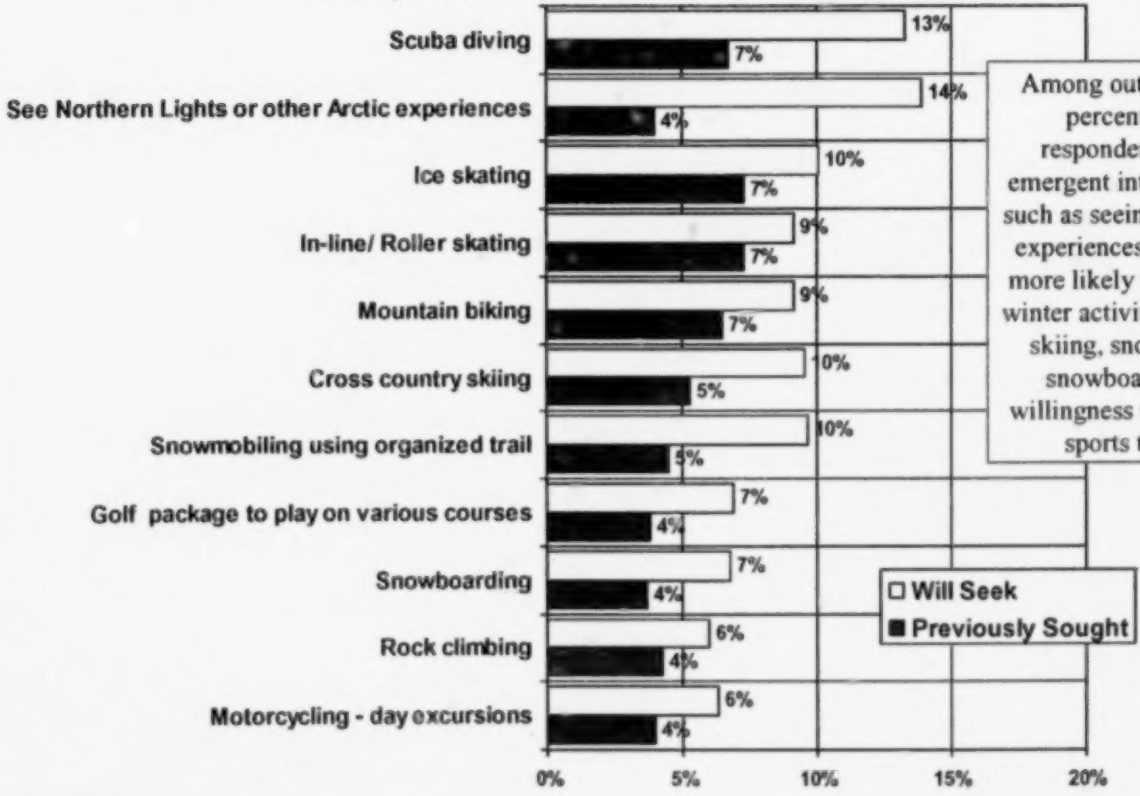
Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey).



Forty (of 57) outdoor vacation activities were significantly more likely to be pursued on future trips relative to the last two years of travel. Among the more common outdoor activities (i.e., those participated in by at least 8 percent of the travellers), emergent outdoor interests were observed for swimming in an ocean, hiking or backpacking, golfing (occasional game and golf resort) and recreational biking. Travellers also were more likely to go horseback riding, kayaking and canoeing, whale watching, salt and fresh water fishing, whitewater rafting, sailing and downhill skiing during the next two years relative to the past two years. Many of these outdoor activities tend to be more exotic.

Outdoor Activities More Likely To Be Sought During Travel In the Next Two Years Relative To Past Two Years (Part 2 of 3)

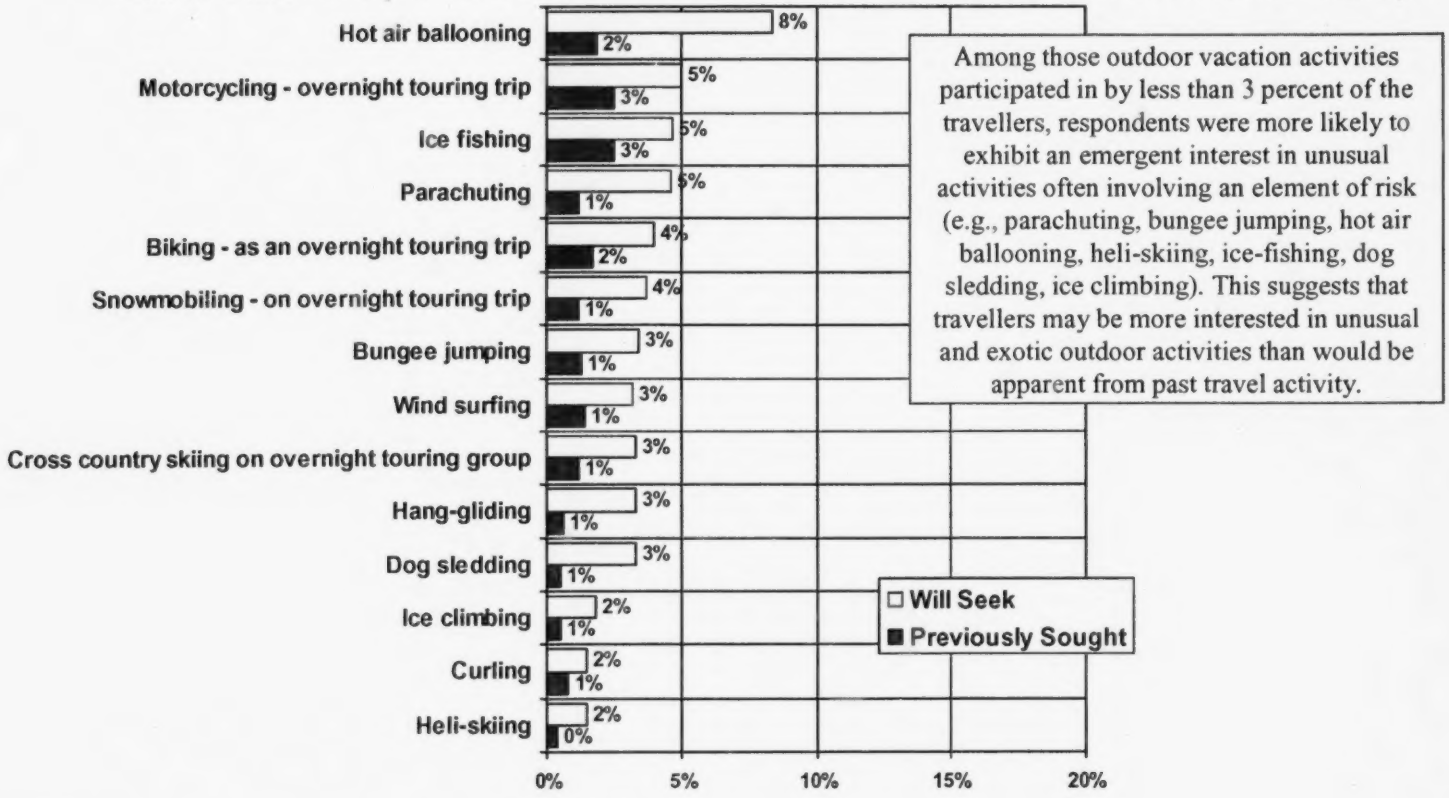
Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey).



Among outdoor activities sought by between 4 percent and 8 percent of the travellers, respondents were more likely to express an emergent interest in unusual outdoor experiences such as seeing the Northern Lights or other Arctic experiences, and rock climbing. They also were more likely to report increased interest in several winter activities such as ice skating, cross-country skiing, snowmobiling on organized trails and snowboarding. This latter trend suggests a willingness to participate more in winter outdoor sports than was apparent in past travel.

Outdoor Activities More Likely To Be Sought During Travel In the Next Two Years Relative To Past Two Years (Part 3 of 3)

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey).

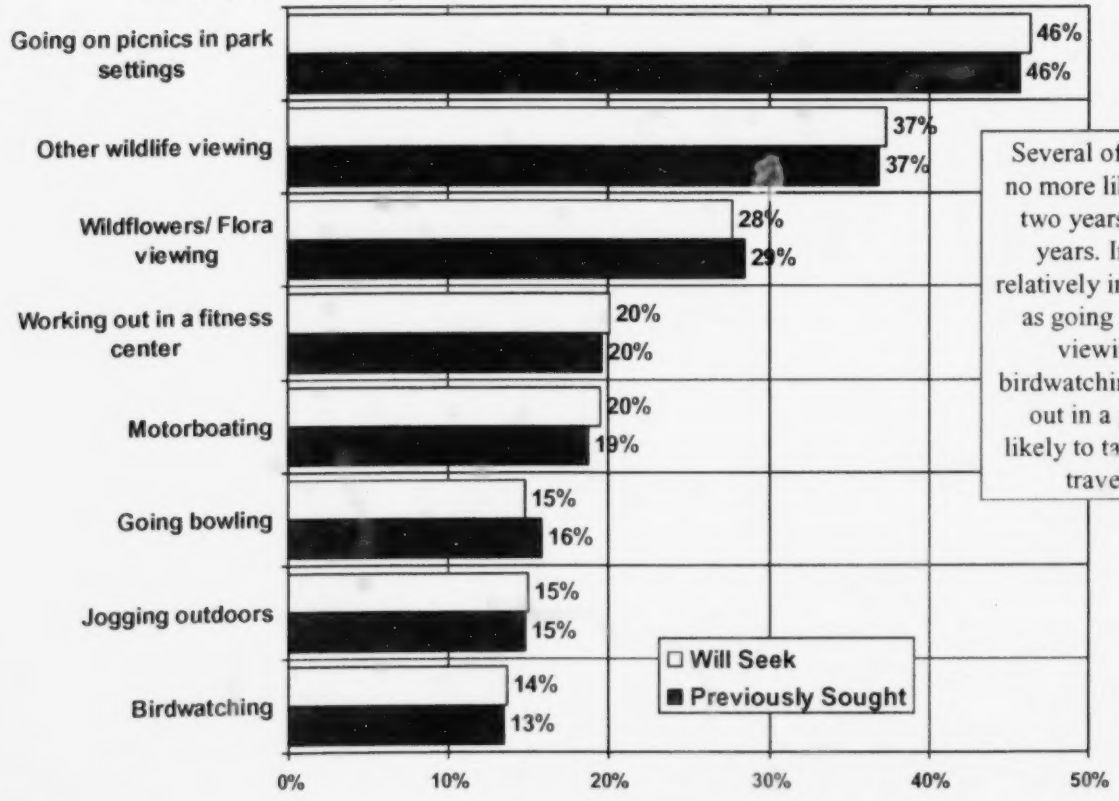


TAMS
Travel Activities & Motivation Survey

TAMS: Emergent Vacation Interests

Outdoor Activities As Likely To Be Sought During Travel In The Next Two Years As During The Past Two Years (Part 1 of 2)

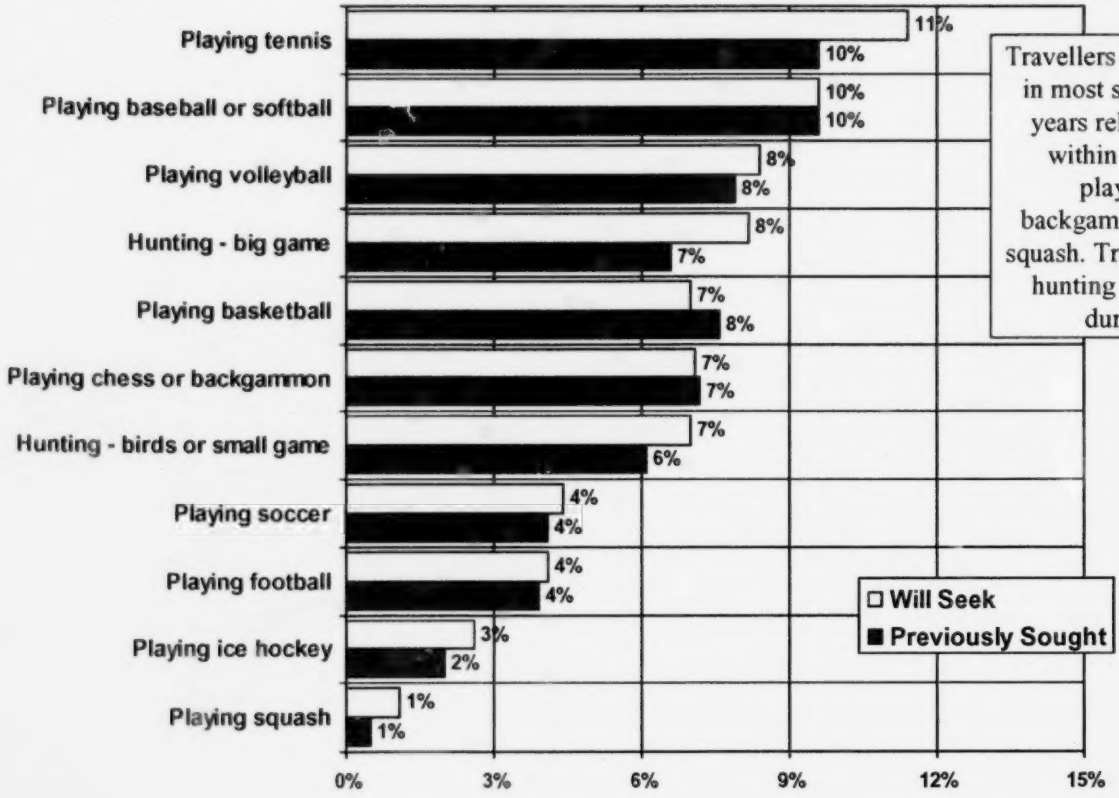
Base: Percent of Population (184) Who Took a Trip in the Past Two Years and Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey).



Several of the outdoor activities assessed were no more likely to be undertaken during the next two years than they were during the past two years. Included among these activities are relatively inactive outdoor vacation pursuits such as going for picnics in park settings, wildlife viewing, flora and fauna viewing, and birdwatching. Fitness activities, such as working out in a gym or jogging, also were no more likely to take place during the next two years of travel than during the last two years.

Outdoor Activities As Likely To Be Sought During Travel In The Next Two Years As During The Past Two Years (Part 2 of 2)

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)



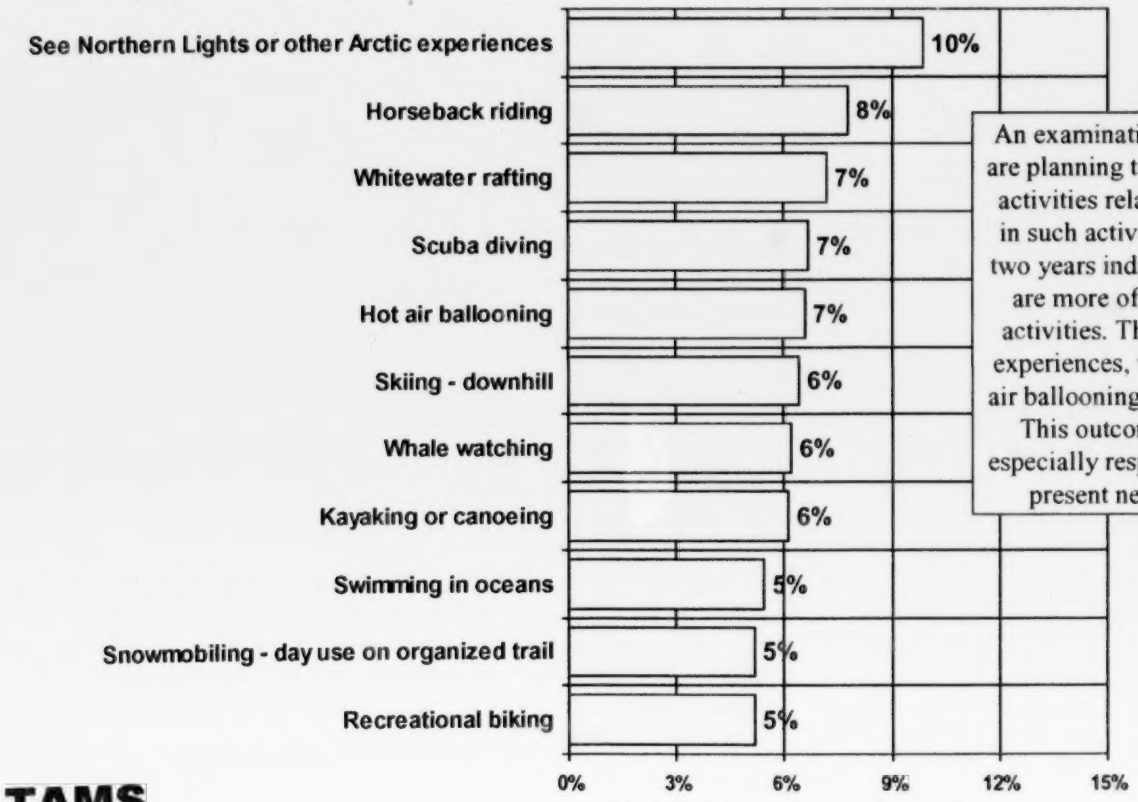
Travellers also were no more likely to participate in most sporting activities during the next two years relative to the past two years. Included within this grouping are activities such as playing tennis, baseball, basketball, backgammon, soccer, football, ice hockey and squash. Travellers also were no more likely to go hunting in the next two years than they were during the past two years of travel.

TAMS
Travel Activities & Motivation Survey

Outdoor Vacation Activities More Likely To Be Done In Next Two Years Than Past Two Years

Change in Percent Likely To Do: Next Two Years Versus Past Two Years

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey).

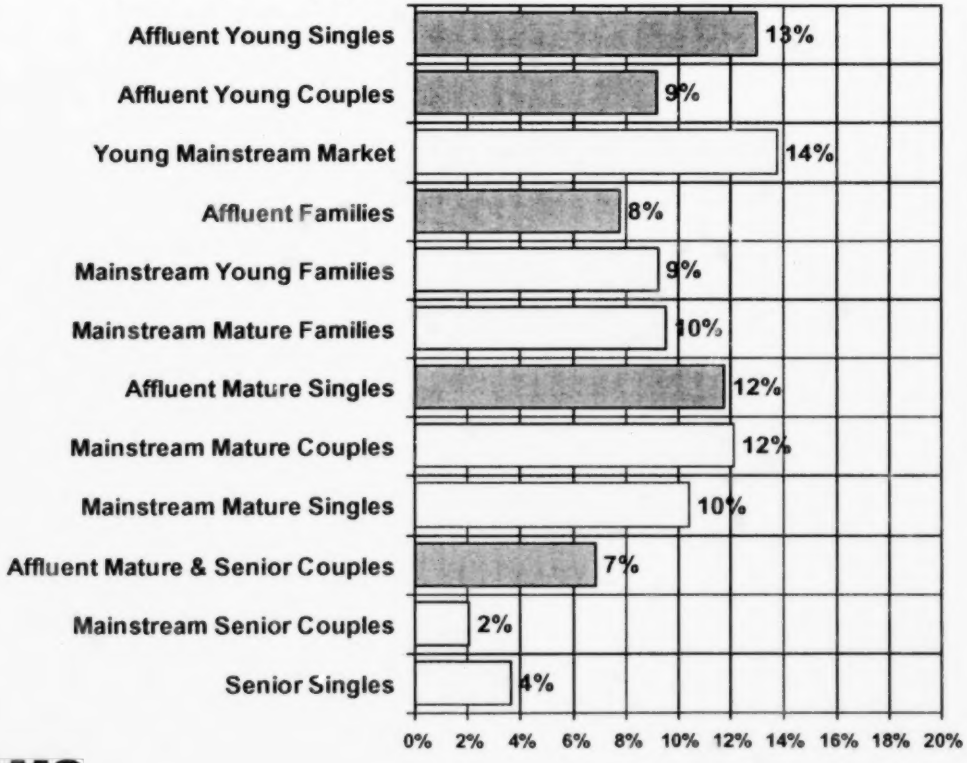


An examination of the changes in the percent that are planning to undertake various outdoor vacation activities relative to the percent who participated in such activities while travelling during the past two years indicates that emergent outdoor pursuits are more often found among unusual or exotic activities. This includes such activities as Arctic experiences, whitewater rafting, scuba diving, hot air ballooning, snowmobiling and whale watching. This outcome suggests that travellers may be especially responsive to promotional activities that present new and unusual outdoor activities.

Percent Net Change in Those Planning to Do Outdoor Vacation Activity in Next Two Years Relative to Those Having Done Activity in Past Two Years

See Northern Lights or Other Arctic Experience

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)



The most pronounced emergent outdoor activity observed in the TAMS database was an increased interest in seeing the Northern Lights or other Arctic experiences. Increased interest in this type of outdoor pursuit was most evident within the Youth segments (e.g., Affluent Young Singles, Young Mainstream Market) and the Mature segments (Affluent Mature Singles, Mainstream Mature Couples, Mainstream Mature Singles). As such, these sectors of the market may be especially responsive to the promotion of such opportunities.

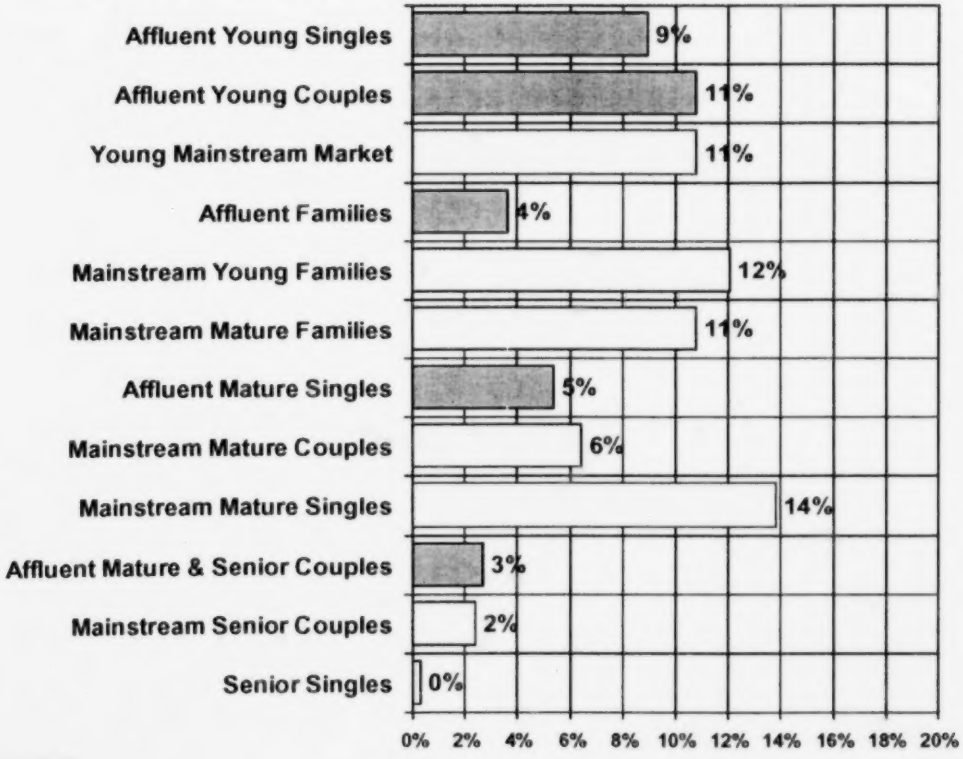
TAMS
Travel Activities & Motivation Survey

TAMS: Emergent Vacation Interests

Percent Net Change in Those Planning to Do Outdoor Vacation Activity in Next Two Years Relative to Those Having Done Activity in Past Two Years

Go Horseback Riding

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)



An emergent interest in horseback riding is most evident among the Mainstream Mature Singles and the Mainstream Family segments (i.e., Mainstream Young Families, Mainstream Mature Families). The Youth segments also exhibit particular interest in horseback riding while on vacation relative to their participation in horseback riding during the past two years of travel.

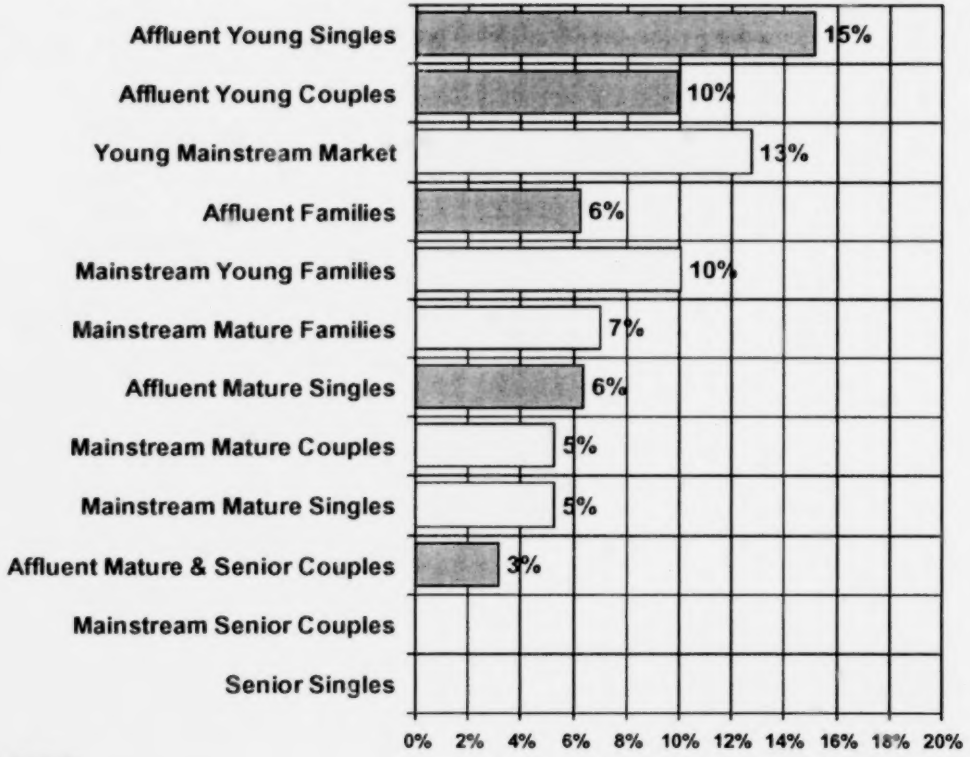
TAMS
Travel Activities & Motivation Survey

TAMS: Emergent Vacation Interests

Percent Net Change in Those Planning to Do Outdoor Vacation Activity in Next Two Years Relative to Those Having Done Activity in Past Two Years

Go Whitewater Rafting

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)



An emergent interest in whitewater rafting is most evident within the Youth segments of the market and, in particular, the Affluent Young Singles and Young Mainstream Market. Mainstream Young Families also were more likely to go whitewater rafting during the next two years relative to the last two years. The extent to which whitewater rafting is an emergent outdoor vacation interest generally declines as the age of the traveller increases.

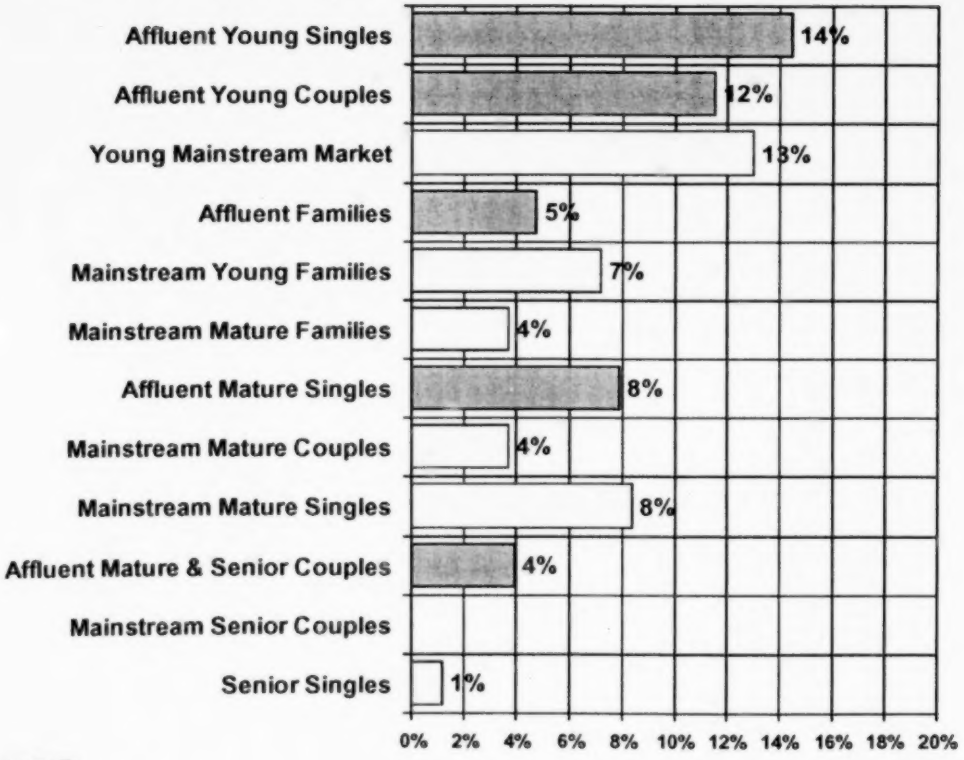
TAMS
Travel Activities & Motivation Survey

TAMS: Emergent Vacation Interests

Percent Net Change in Those Planning to Do Outdoor Vacation Activity in Next Two Years Relative to Those Having Done Activity in Past Two Years

Go Scuba Diving

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)



An emergent interest in scuba diving is most evident within the Youth segments of the markets The extent to which scuba diving is an emergent outdoor vacation activity generally declines as the age of the traveller increases. However, Affluent Mature Singles and Mainstream Mature Singles also exhibit an above-average emergent interest in scuba diving relative to their same-age peers.

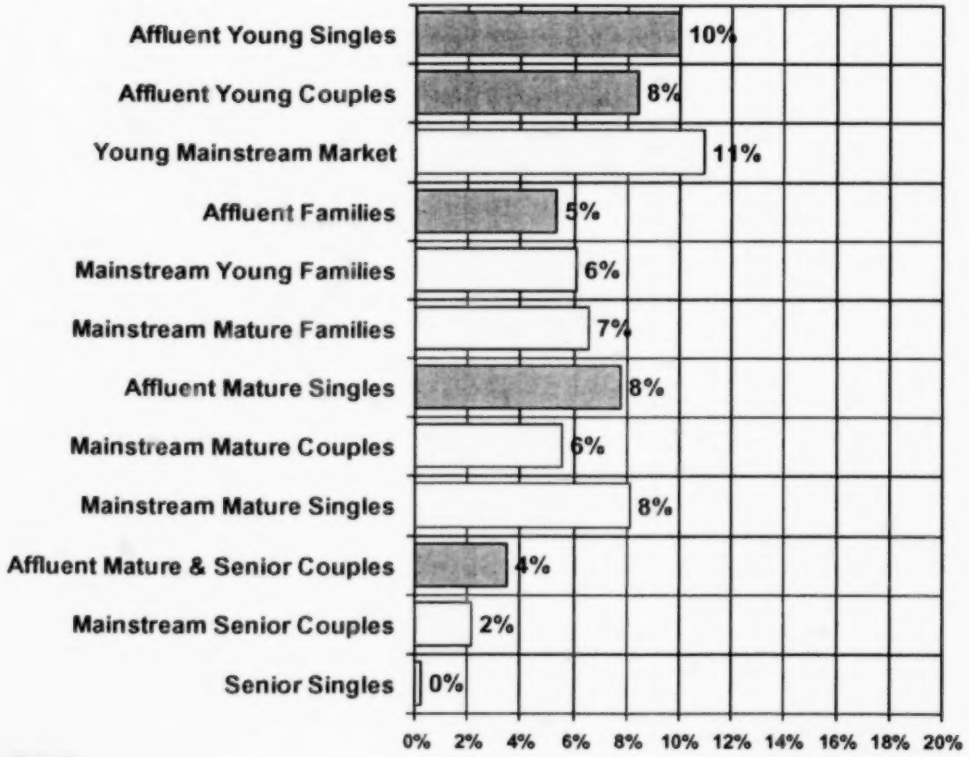
TAMS
Travel Activities & Motivation Survey

TAMS: Emergent Vacation Interests

Percent Net Change in Those Planning to Do Outdoor Vacation Activity in Next Two Years Relative to Those Having Done Activity in Past Two Years

Go Hot Air Ballooning

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)



An emergent interest in hot air ballooning is apparent across the Youth, Family and Mature sectors of the market. The Youth segments were especially likely to exhibit an emergent interest in hot air ballooning relative to the last two years of travel.

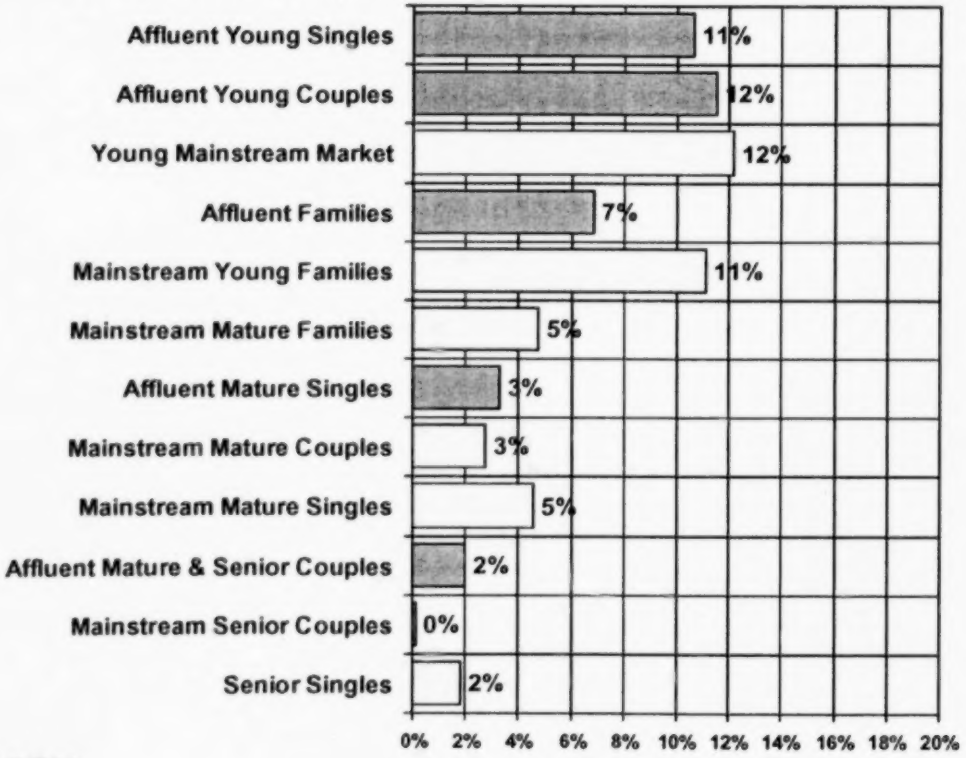
TAMS
Travel Activities & Motivation Survey

TAMS: Emergent Vacation Interests

Percent Net Change in Those Planning to Do Outdoor Vacation Activity in Next Two Years Relative to Those Having Done Activity in Past Two Years

Go Downhill Skiing

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)

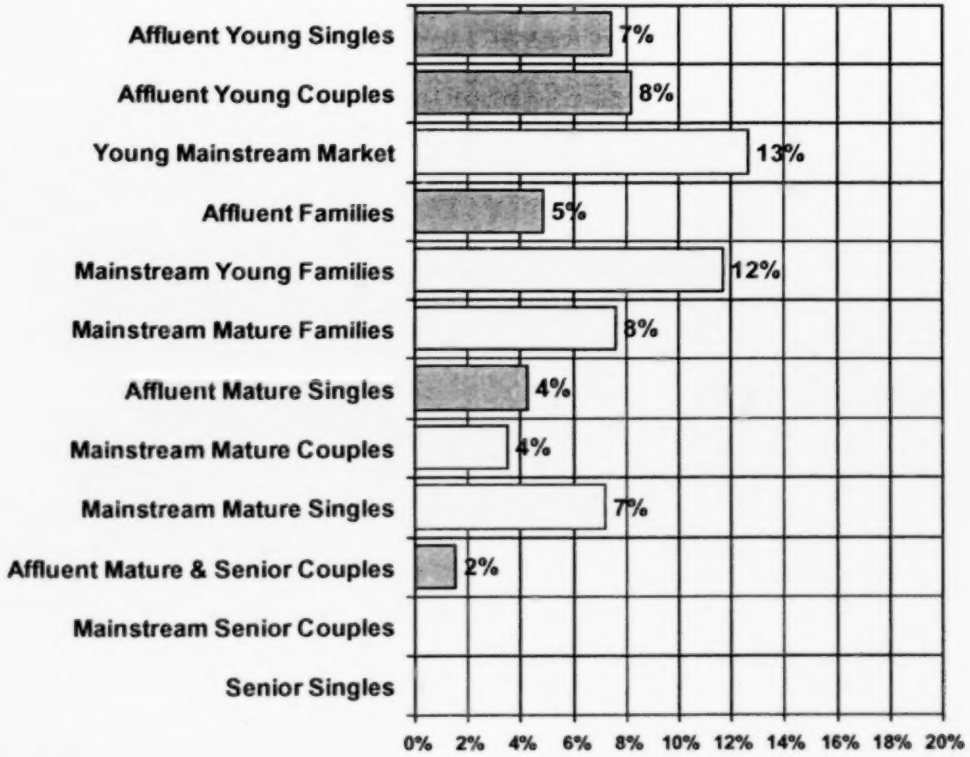


An emergent interest in downhill skiing is most apparent in the Youth segments as well as the Mainstream Young Families. An emergent interest in downhill skiing generally declines as the age of the traveller increases.

Percent Net Change in Those Planning to Do Outdoor Vacation Activity in Next Two Years Relative to Those Having Done Activity in Past Two Years

Go Whale Watching

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)



The Young Mainstream Market and the Mainstream Young Families were the most likely to exhibit an emergent interest in whale watching. As with other outdoor vacation activities, the extent to which whale watching is an emergent outdoor vacation interest generally declines as the age of the traveller increases.

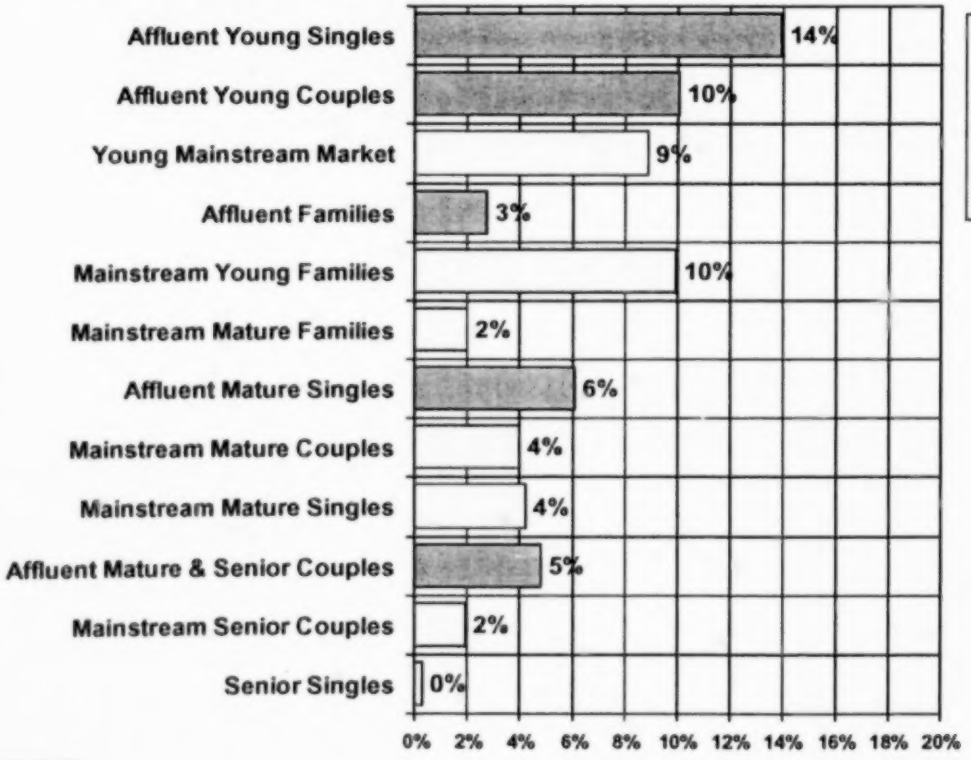
TAMS
Travel Activities & Motivation Survey

TAMS: Emergent Vacation Interests

Percent Net Change in Those Planning to Do Outdoor Vacation Activity in Next Two Years Relative to Those Having Done Activity in Past Two Years

Go Canoeing or Kayaking

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)



An emergent interest in canoeing and kayaking is most apparent in the Youth segments as well as among the Mainstream Young Families. An emergent interest in canoeing or kayaking generally declines as the age of the traveller increases.

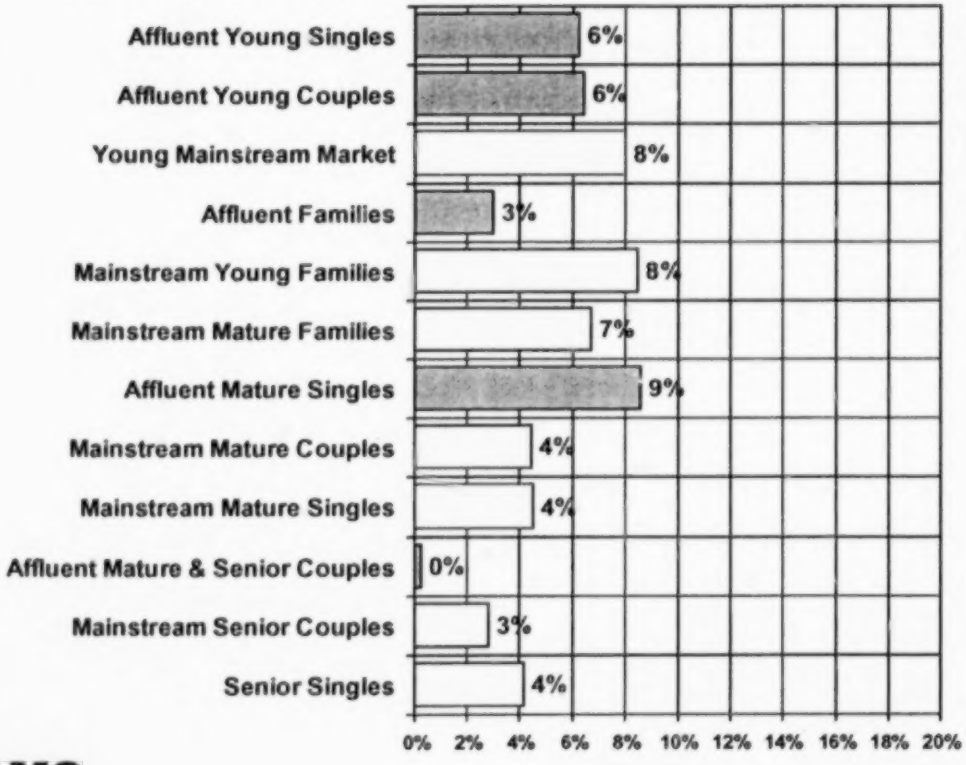
TAMS
Travel Activities & Motivation Survey

TAMS: Emergent Vacation Interests

Percent Net Change in Those Planning to Do Outdoor Vacation Activity in Next Two Years Relative to Those Having Done Activity in Past Two Years

Go Swimming in an Ocean

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)



An emergent interest in swimming while on vacation is apparent across the Youth, Family and Mature markets. The Affluent Mature and Senior Couples was the only segment that was not more likely to go swimming during the next two years than during the past two years of travel.

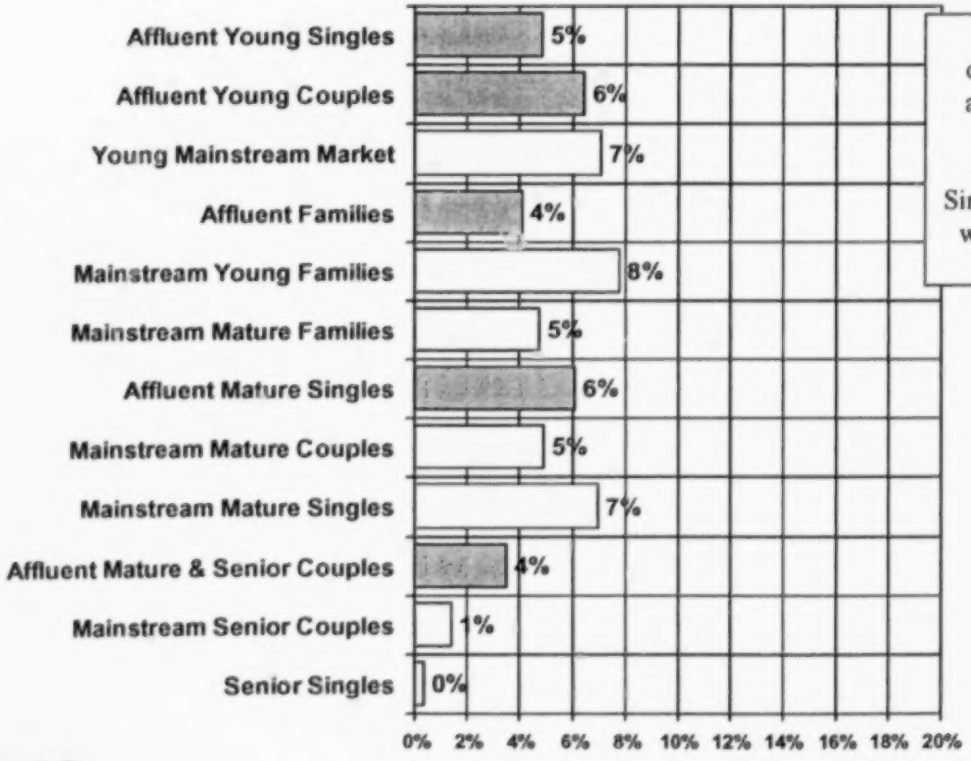
TAMS
Travel Activities & Motivation Survey

TAMS: Emergent Vacation Interests

Percent Net Change in Those Planning to Do Outdoor Vacation Activity in Next Two Years Relative to Those Having Done Activity in Past Two Years

Snowmobiling (On Organized Trail)

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)

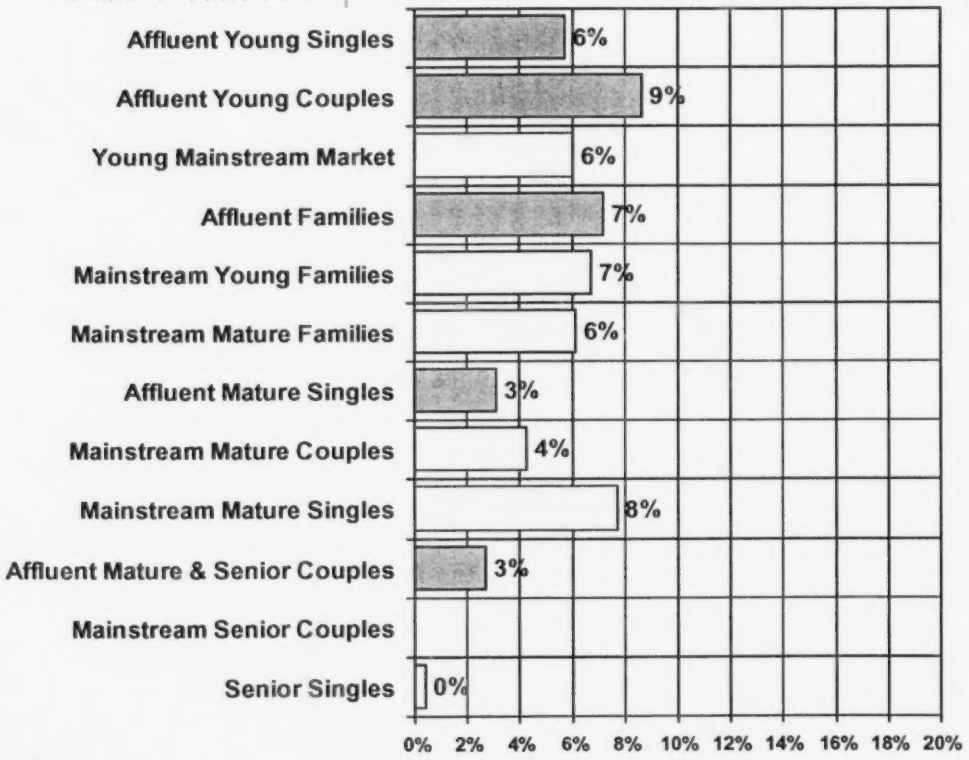


An emergent interest in snowmobiling (on organized trails) while on vacation is apparent across the Youth, Family and Mature markets. Mainstream Young Families, the Young Mainstream Market and Mainstream Mature Singles were especially likely to indicate that they were more likely to go snowmobiling than they had during the past two years.

Percent Net Change in Those Planning to Do Outdoor Vacation Activity in Next Two Years Relative to Those Having Done Activity in Past Two Years

Recreational Biking

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)



Recreational biking was observed to be an emergent interest within the Youth and Family segments. Mainstream Mature Singles also were more likely to express an interest in recreational biking in future travel than during the past two years of travel.

Technical Note
Only differences in the vacation experiences sought and the vacation experience that will be sought have been shown in this chart.

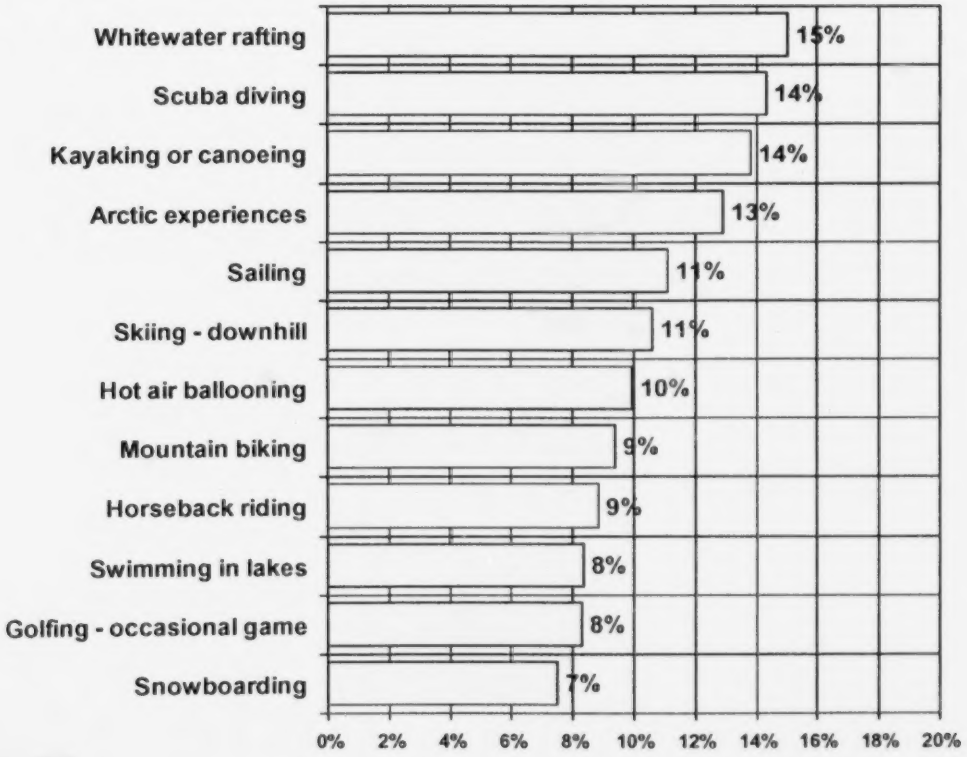
TAMS
Travel Activities & Motivation Survey

TAMS: Emergent Vacation Interests

Percent Net Change in Those Planning to Do Activity in Next Two Years
Minus Those Having Done Activity in Past Two Years

Top 12 Emergent Outdoor Interests — Young Affluent Singles

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and
Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)

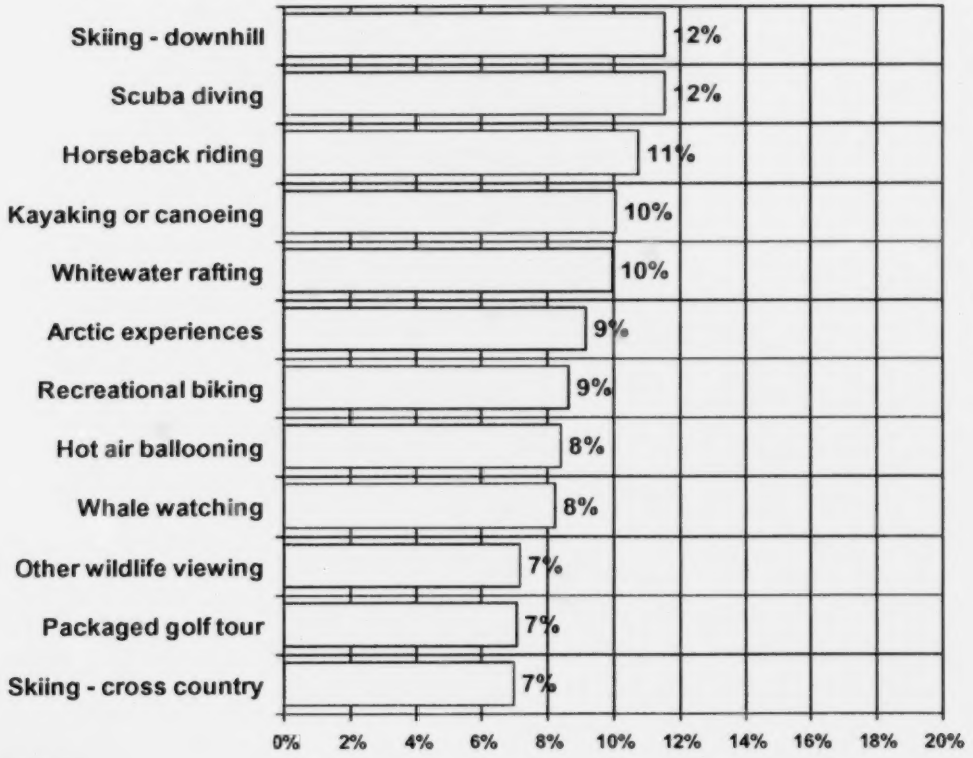


The emergent outdoor vacation interests of the Young Affluent Singles are in unusual and/or more strenuous activities such as whitewater rafting, scuba diving, downhill skiing, hot air ballooning, snowboarding and mountain biking. Young Affluent Singles may be responsive to tourism promotions which highlight high-energy and exotic experiences.

Percent Net Change in Those Planning to Do Activity in Next Two Years
Minus Those Having Done Activity in Past Two Years

Top 12 Emergent Outdoor Interests — Young Affluent Couples

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and
Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)



Young Affluent Couples exhibited the greatest emergent interest in whitewater rafting, scuba diving, and kayaking and canoeing, suggesting that this segment may be especially responsive to water-related outdoor activities. They also exhibited an emergent interest in Arctic experiences (e.g., Northern Lights) as well as participating in selected winter sports (downhill or cross-country skiing).

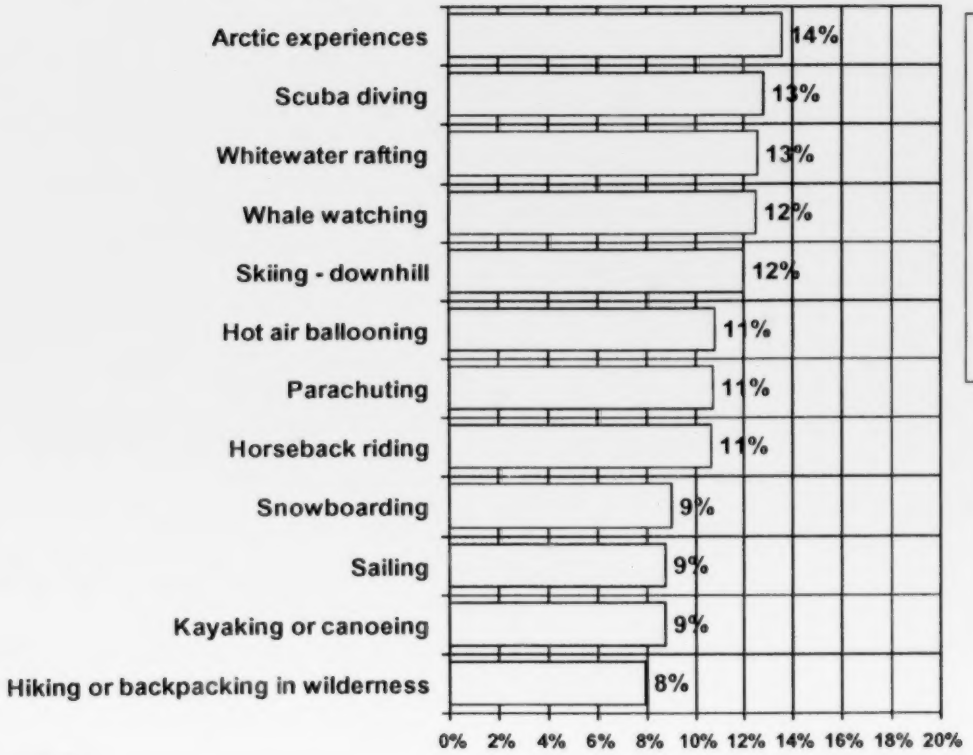
TAMS
Travel Activities & Motivation Survey

TAMS: Emergent Vacation Interests

Percent Net Change in Those Planning to Do Activity in Next Two Years
Minus Those Having Done Activity in Past Two Years

Top 12 Emergent Outdoor Interests — Young Mainstream Market

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and
Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)



As with the Young Affluent Singles, the outdoor vacation activities more likely to be pursued by the Young Mainstream Market relative to the last two years tend to be unusual and/or more strenuous activities such as whitewater rafting, scuba diving, downhill skiing, hot air ballooning, whale watching and parachuting. As such, the Young Mainstream Market may be responsive to tourism promotions which highlight high-energy and unusual outdoor activities.

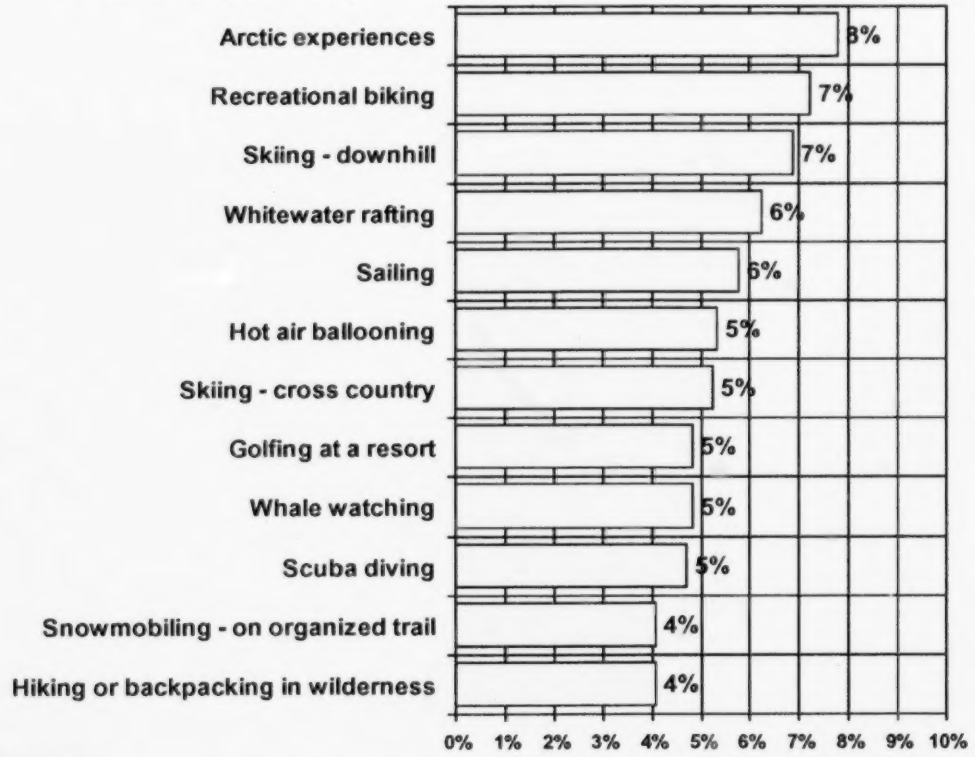
TAMS
Travel Activities & Motivation Survey

TAMS: Emergent Vacation Interests

Percent Net Change in Those Planning to Do Activity in Next Two Years
Minus Those Having Done Activity in Past Two Years

Top 12 Emergent Outdoor Interests — Affluent Families

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and
Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)



Outdoor vacation activities more likely to be pursued by Affluent Families relative to the last two years include a mixture of unusual activities (such as whitewater rafting, scuba diving, hot air ballooning and whale watching) along with more conventional outdoor vacation pursuits (such as recreational biking, sailing, backpacking in the wilderness and golfing at a resort). The activities that are most emergent within this segment are slightly less energetic than those observed within the Youth segments.

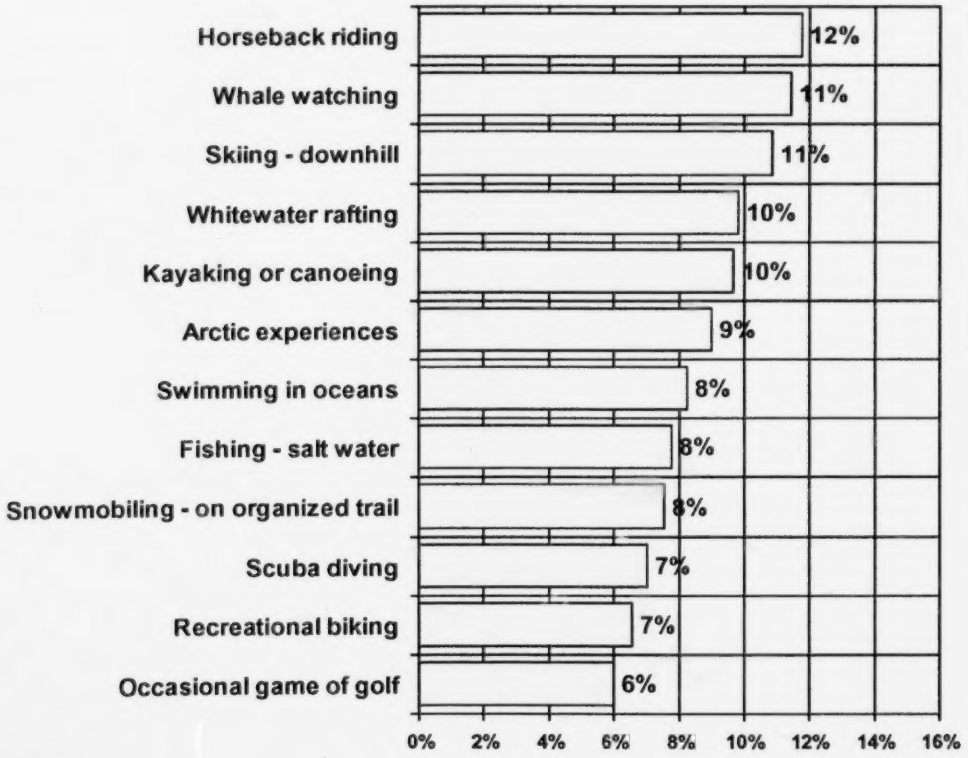
TAMS
Travel Activities & Motivation Survey

TAMS: Emergent Vacation Interests

Percent Net Change in Those Planning to Do Activity in Next Two Years
Minus Those Having Done Activity in Past Two Years

Top 12 Emergent Outdoor Interests — Mainstream Young Families

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and
Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)

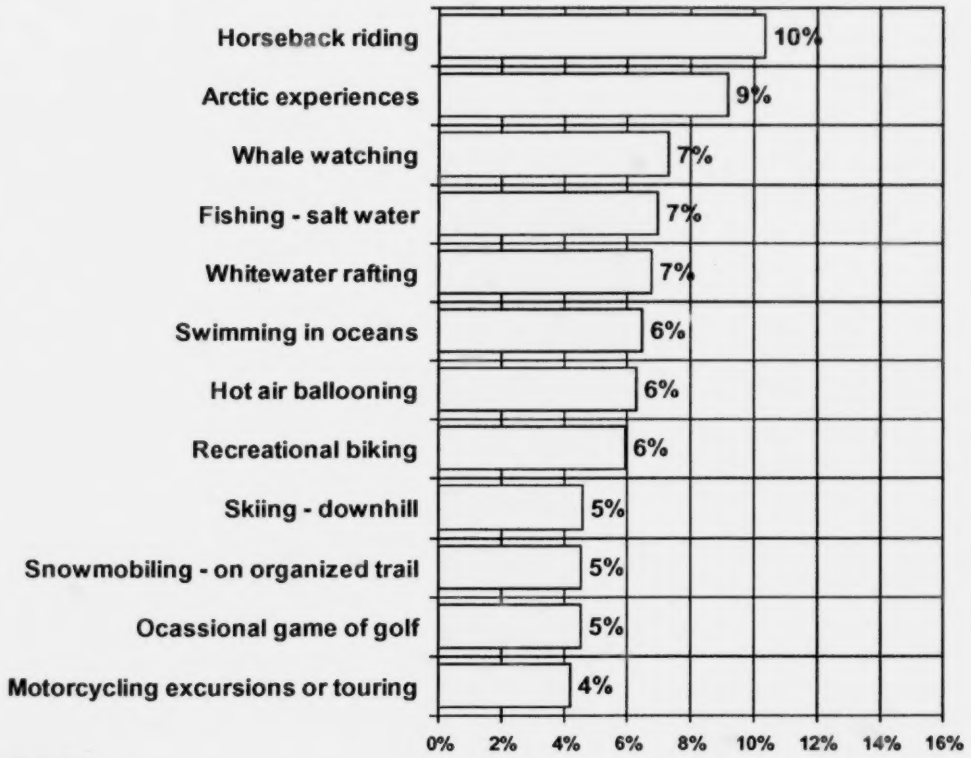


Outdoor vacation activities more likely to be pursued by the Mainstream Young Families relative to the last two years include a mixture of unusual activities (such as whale watching, whitewater rafting and scuba diving), along with more conventional outdoor vacation activities that can often be done with smaller children (such as swimming in the ocean, horseback riding downhill skiing and salt-water fishing).

Percent Net Change in Those Planning to Do Activity in Next Two Years
Minus Those Having Done Activity in Past Two Years

Top 12 Emergent Outdoor Interests — Mainstream Mature Families

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and
Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)



The most prominent emergent outdoor vacation interests of the Mainstream Mature Families include some unusual experiences such as whitewater rafting, hot air ballooning and whale watching, but a larger proportion of conventional outdoor vacation pursuits such as recreational biking, downhill skiing, snowmobiling and golfing than is apparent in younger segments. As well, the activities that are most emergent within this segment are generally less energetic than those observed within the Youth segments.

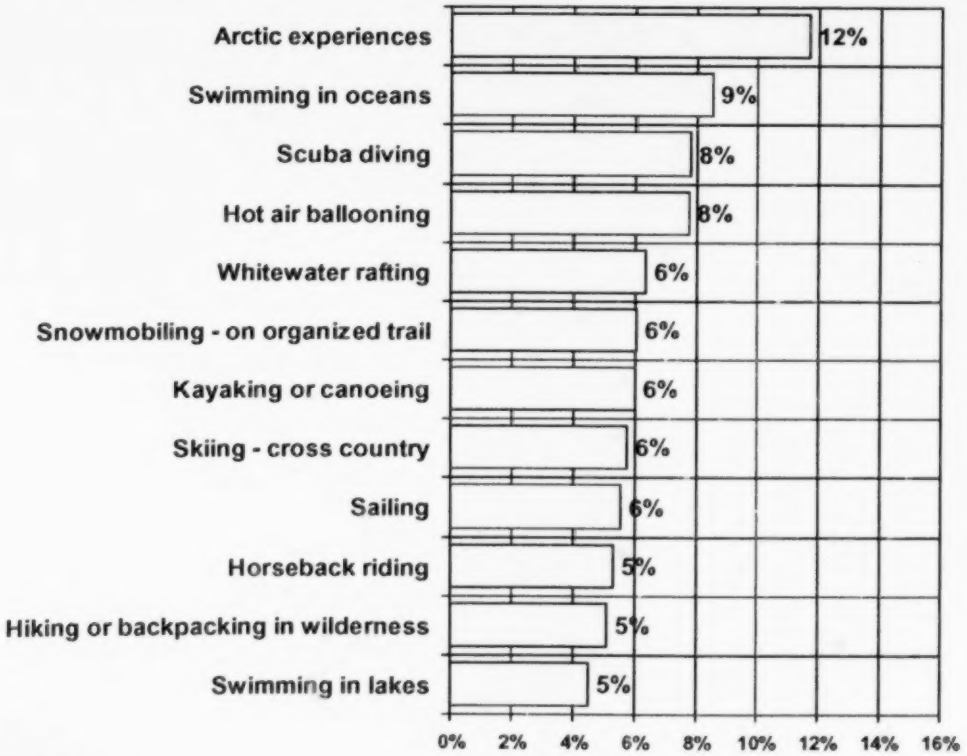
TAMS
Travel Activities & Motivation Survey

TAMS: Emergent Vacation Interests

Percent Net Change in Those Planning to Do Activity in Next Two Years
Minus Those Having Done Activity in Past Two Years

Top 12 Emergent Outdoor Interests — Affluent Mature Singles

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and
Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)

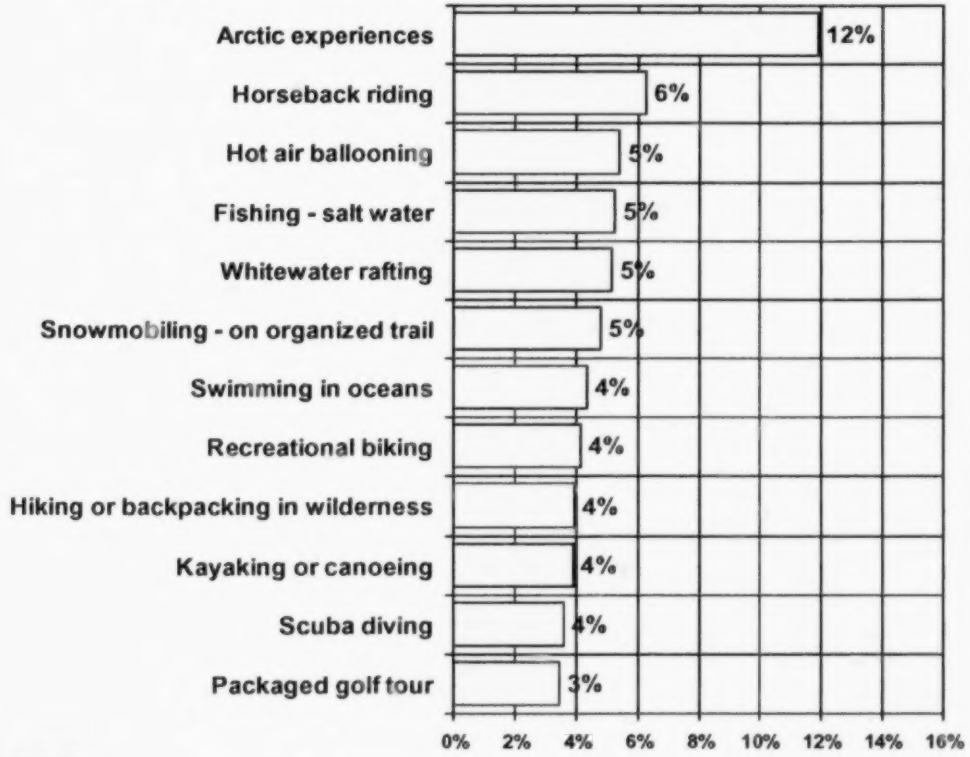


Affluent Mature Singles exhibited a particular emergent interest in having an Arctic experience such as seeing the Northern Lights. They also show an emergent interest in unusual activities such as whitewater rafting, scuba diving and hot air ballooning, but a larger proportion of conventional outdoor vacation pursuits such as swimming in oceans or lakes, canoeing and kayaking, and cross-country skiing. The activities that are most emergent within this segment are more conventional than those observed for younger segments.

Percent Net Change in Those Planning to Do Activity in Next Two Years
Minus Those Having Done Activity in Past Two Years

Top 12 Emergent Outdoor Interests — Mainstream Mature Couples

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and
Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)

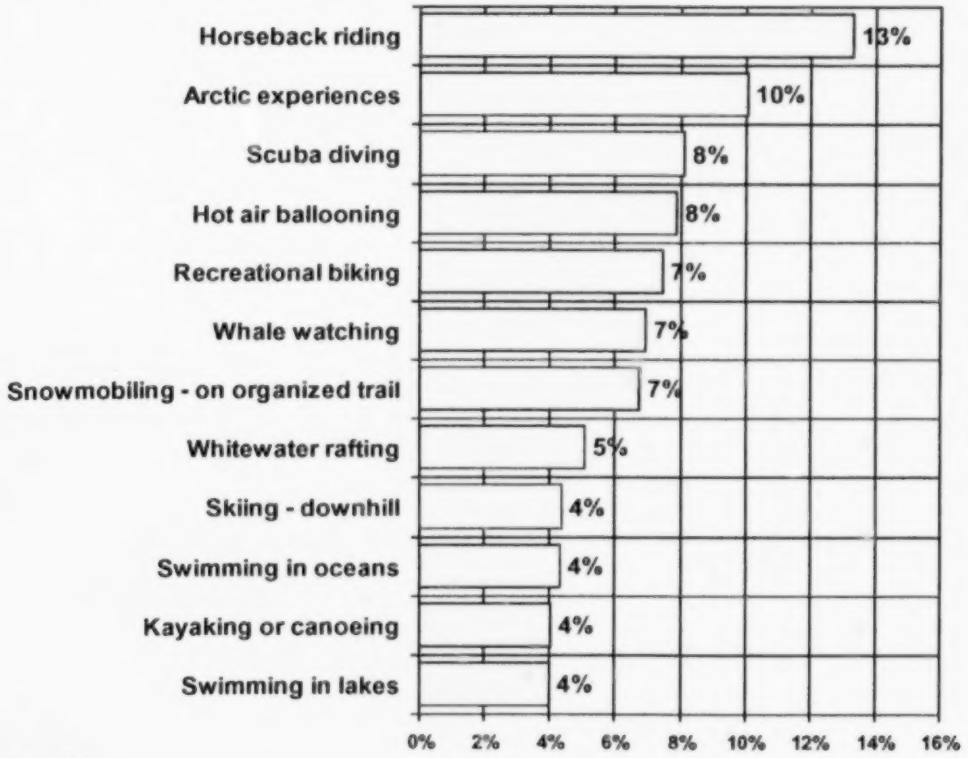


Mainstream Mature Couples also exhibited particular emergent interest in having an Arctic experience such as seeing the Northern Lights. While they exhibited some emergent interest in unusual activities such as whitewater rafting and hot air ballooning, the majority of the emergent outdoor vacation interest evident in this segment tended to be conventional outdoor vacation activities such as fishing, swimming in an ocean, recreational biking, canoeing and kayaking, backpacking, and cross-country skiing. The activities that were most emergent among Mainstream Mature Couples were often associated with camping or resort vacations.

Percent Net Change in Those Planning to Do Activity in Next Two Years
Minus Those Having Done Activity in Past Two Years

Top 12 Emergent Outdoor Interests — Mainstream Mature Singles

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and
Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)

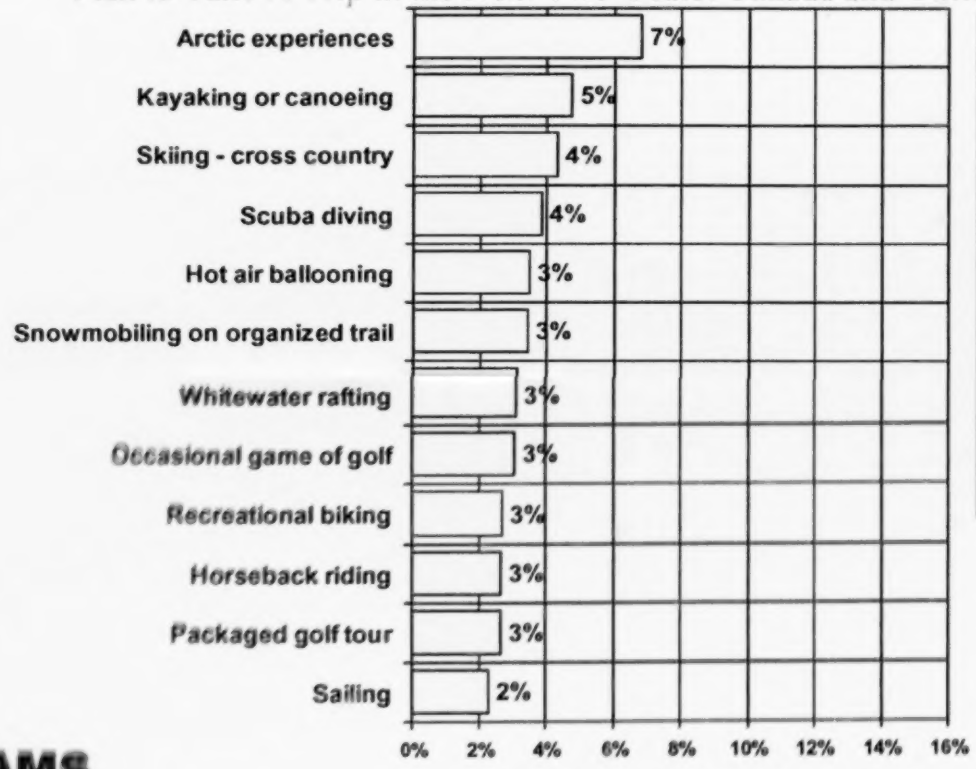


Mainstream Mature Singles tend to have been less active in their outdoor vacation pursuits over the course of the last two years of travel. However, they appeared somewhat discontented with this fact, and exhibited aspirations to undertake several outdoor vacation activities during the next two years. They exhibited particular emergent interest in horseback riding, scuba diving and recreational biking. They were also quite interested in unusual vacation experiences such as Arctic experiences, hot air ballooning and whale watching.

Percent Net Change in Those Planning to Do Activity in Next Two Years
Minus Those Having Done Activity in Past Two Years

Top 12 Emergent Outdoor Interests — Affluent Mature and Senior Couples

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)



TAMS: Emergent Vacation Interests

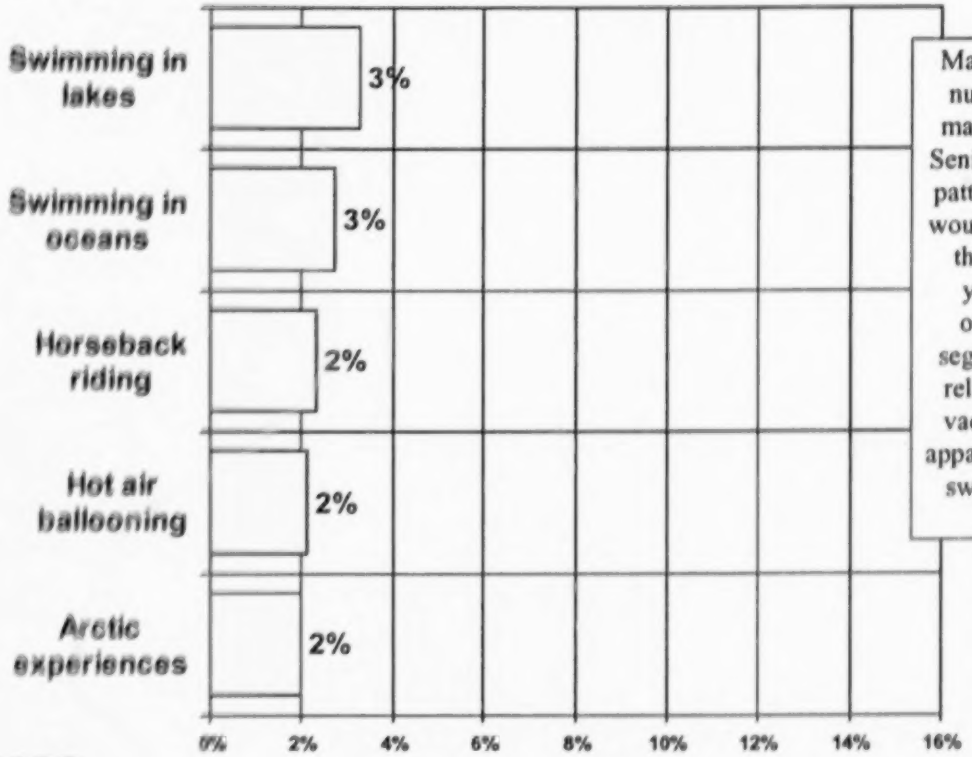
Affluent Mature and Senior Couples are the most frequent travellers in the market. Unencumbered by parental responsibilities and enjoying relatively high affluence, this segment appears to have been better able to have satisfied their vacation interests during the past two years. Accordingly, they were less likely to have mentioned activities they would like to pursue during the next two years of travel that they had not already done during the past two years. However, this segment did exhibit a relatively high emergent interest in Arctic experiences, as well as conventional outdoor activities such as kayaking and canoeing, cross-country skiing and scuba diving.

TAMS
Travel Activities & Motivation Survey

Percent Net Change in Those Planning to Do Activity in Next Two Years
Minus Those Having Done Activity in Past Two Years

Top 12 Emergent Outdoor Interests — Mainstream Senior Couples

Base: Percent of Population (181) Who Took a Trip in the Past Two Years and
Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)

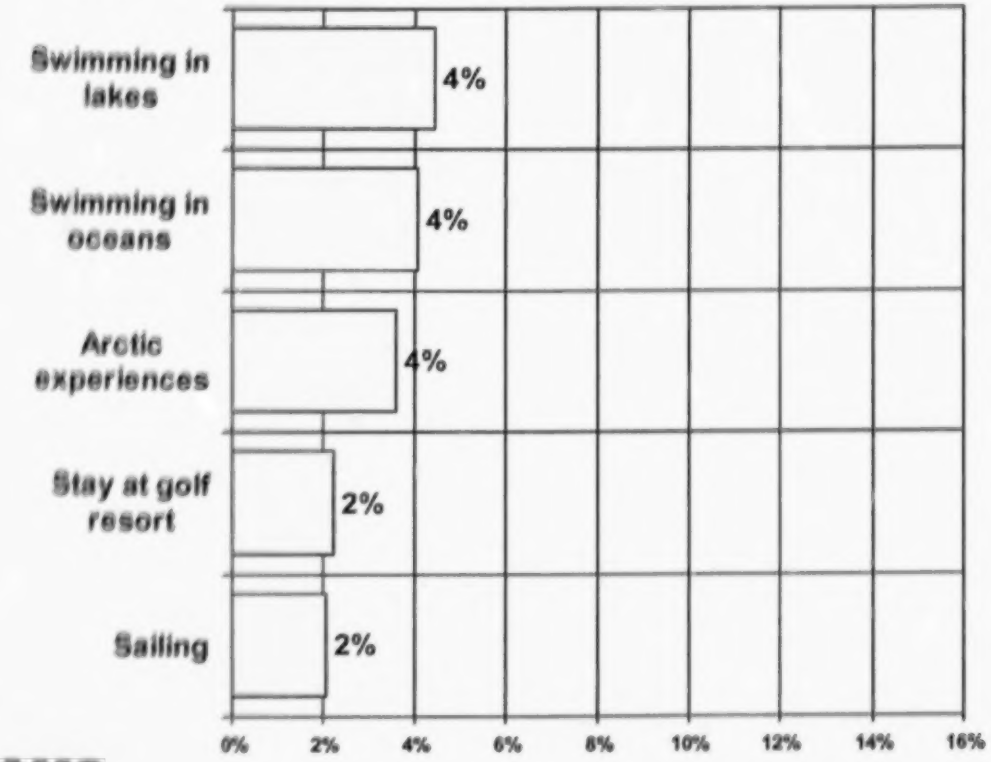


Mainstream Senior Couples exhibited the fewest number of emergent outdoor interests of the 12 market segments. This suggests that Mainstream Senior Couples are more established in their travel patterns, and have few outdoor activities that they would like to pursue during the next two years that they have not already done during the last two years. The comparative absence of emergent outdoor vacation interests evident within this segment also reflects the fact that this segment is relatively inactive in outdoor activities while on vacations. Those emergent interests which were apparent tend to be less strenuous activities such as swimming, horseback riding, hot air ballooning and having an Arctic experience.

Percent Net Change in Those Planning to Do Activity in Next Two Years
Minus Those Having Done Activity in Past Two Years

Top 12 Emergent Outdoor Interests — Senior Singles

Base: Percent of Population (184) Who Took a Trip in the Past Two Years and
Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)



Senior Singles are also comparative inactive in most outdoor activities. As with Senior Couples, Senior Singles exhibited few emergent outdoor vacation interests, and those that were apparent tend to be less strenuous such as swimming, golfing, sailing and having an Arctic experience.

TAMS
Travel Activities & Motivation Survey

TAMS: Emergent Vacation Interests

Section Four

Emergent Cultural and Entertainment Vacation Interests

Emergent Cultural and Entertainment Vacation Interests

- Research Method -

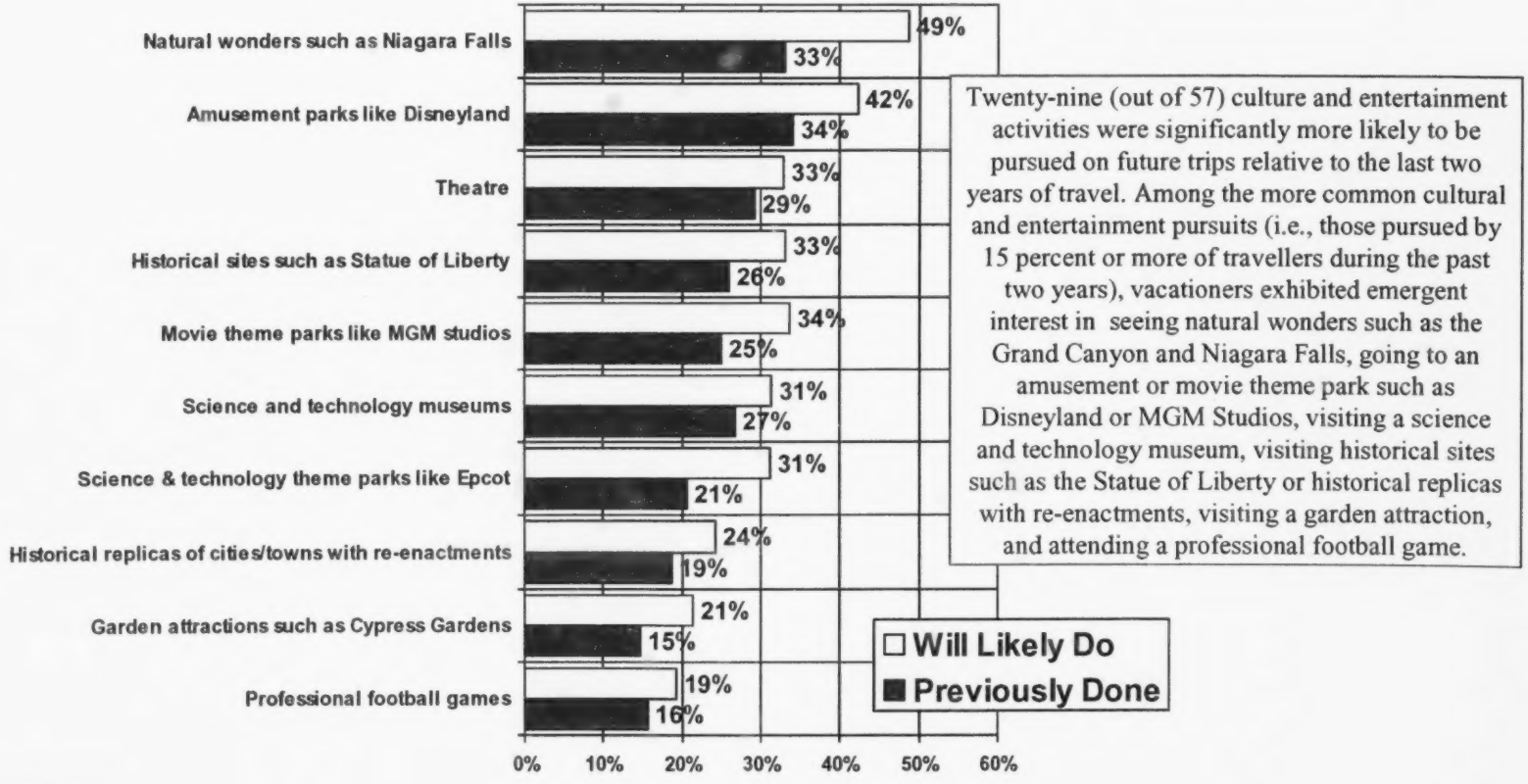
In the mailback survey, those who had taken a trip during the past two years were asked which of 57 culture and entertainment activities they had participated in over the course of the last two years of overnight travel.

They were also asked which of these same culture and entertainment activities they were likely to pursue over the course of the next two years while travelling.

The difference in the percent who had pursued each type of culture and entertainment vacation activity during the past two years and the percent who planned to participate in an culture and entertainment vacation activity during the next two years was used as a gauge of the extent to which each culture and entertainment activity was an emergent interest.

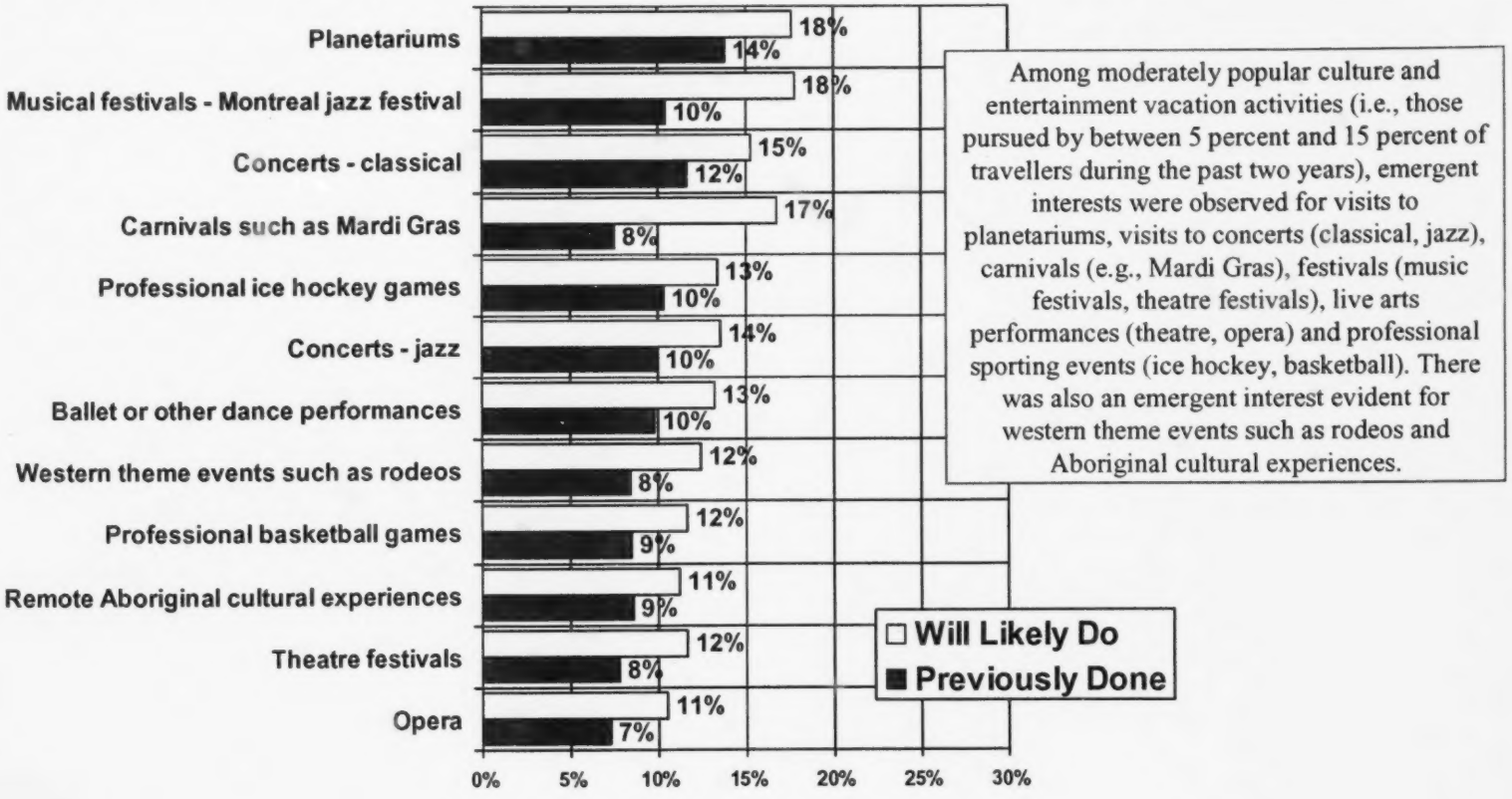
Cultural and Entertainment Activities More Likely to Be Sought In Next Two Years Than Past Two Years (Part 1 of 3)

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)


Natural wonders such as Niagara Falls
49%
33%
Amusement parks like Disneyland
42%
34%
Theatre
33%
29%
Historical sites such as Statue of Liberty
33%
26%
Movie theme parks like MGM studios
34%
25%
Science and technology museums
31%
27%
Science & technology theme parks like Epcot
31%
21%
Historical replicas of cities/towns with re-enactments
24%
19%
Garden attractions such as Cypress Gardens
21%
15%
Professional football games
19%
16%
0%
10%
20%
30%
40%
50%
60%
Will Likely Do
Previously Done
Twenty-nine (out of 57) culture and entertainment activities were significantly more likely to be pursued on future trips relative to the last two years of travel. Among the more common cultural and entertainment pursuits (i.e., those pursued by 15 percent or more of travellers during the past two years), vacationers exhibited emergent interest in seeing natural wonders such as the Grand Canyon and Niagara Falls, going to an amusement or movie theme park such as Disneyland or MGM Studios, visiting a science and technology museum, visiting historical sites such as the Statue of Liberty or historical replicas with re-enactments, visiting a garden attraction, and attending a professional football game.

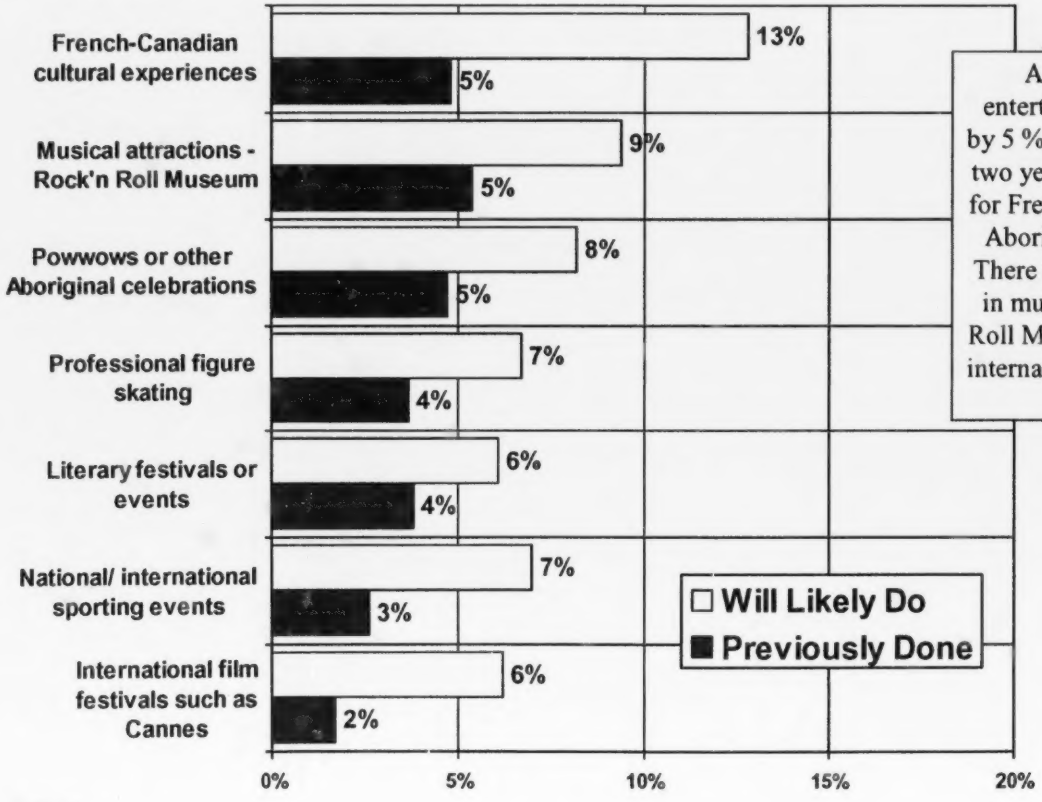
Cultural and Entertainment Activities More Likely to Be Sought In Next Two Years Than Past Two Years (Part 2 of 3)

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)



Cultural and Entertainment Activities More Likely to Be Sought In Next Two Years Than Past Two Years (Part 3 of 3)

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)



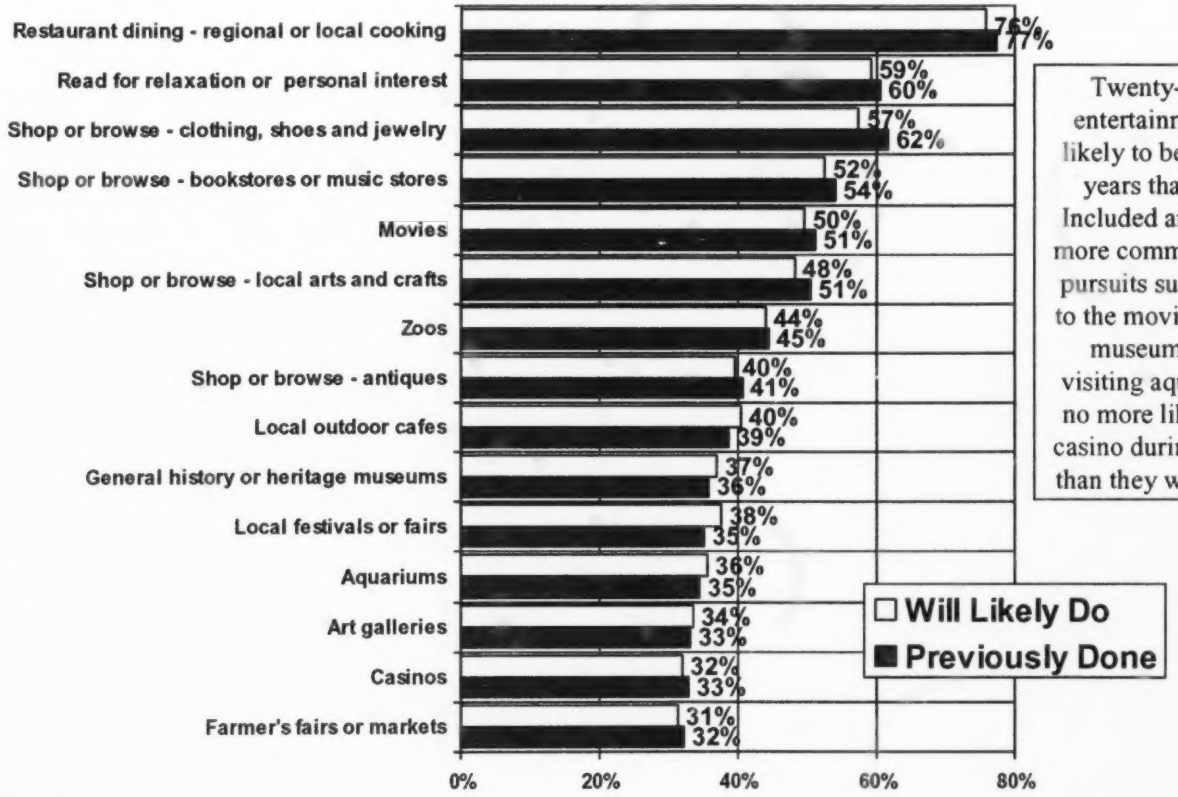
Among the less popular culture and entertainment activities (i.e., those pursued by 5 % or less of the travellers during the past two years), emergent interests were observed for French-Canadian cultural experiences and Aboriginal celebrations such as powwows. There were also emergent interests exhibited in musical attractions such as the Rock and Roll Museum, professional figure skating and international sporting events, literary festivals and film festivals.

TAMS
Travel Activities & Motivation Survey

TAMS: Emergent Vacation Interests

Cultural and Entertainment Activities As Likely to Be Sought In Next Two Years As During the Past Two Years (Part 1 of 2)

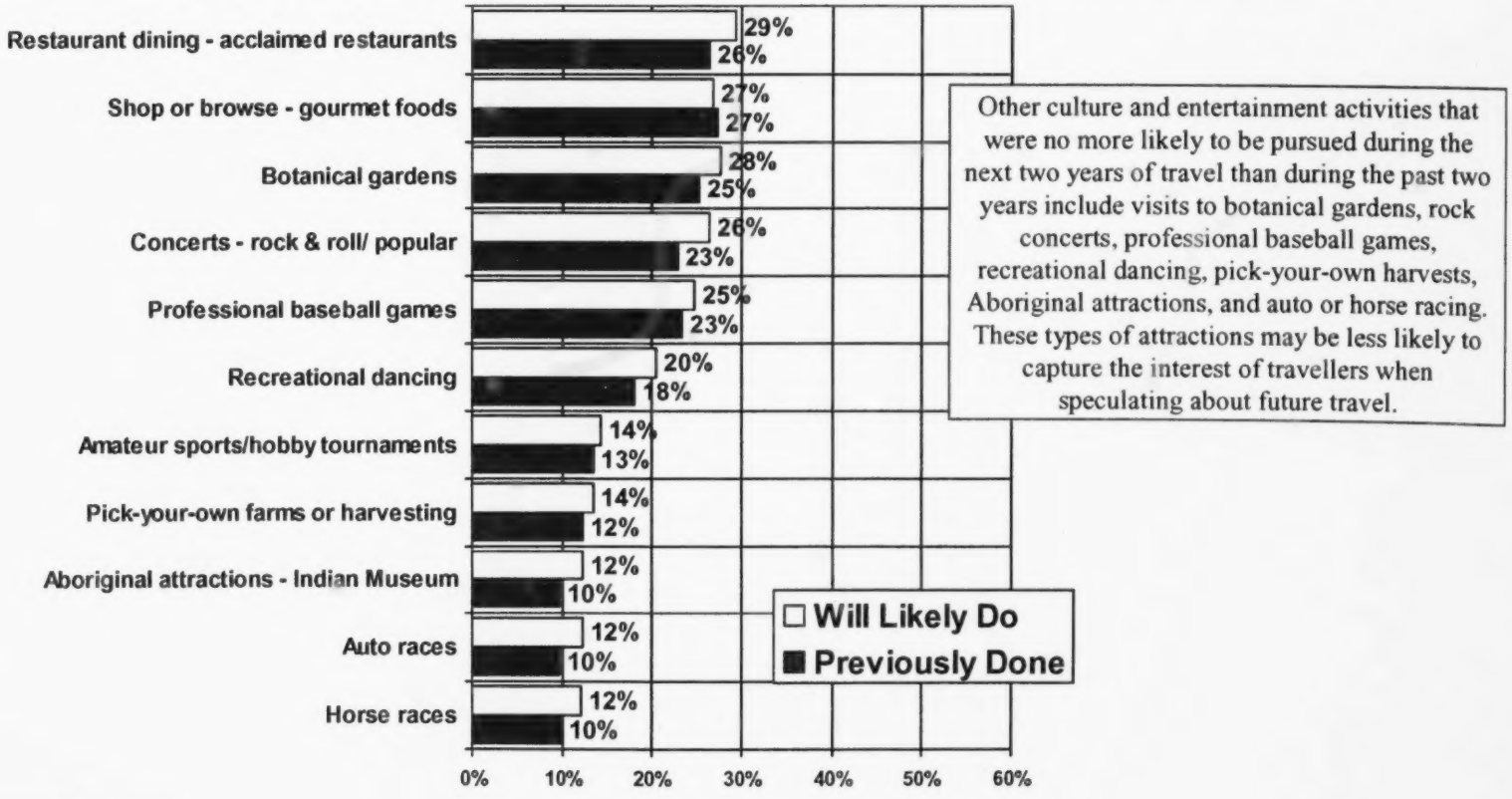
Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)



Twenty-eight of the 57 culture and entertainment activities were no more likely to be pursued during the next two years than during the last two years. Included among these were many of the more common cultural and entertainment pursuits such as dining, shopping, going to the movies, visiting history or heritage museums, visiting art galleries and visiting aquariums. Travellers were also no more likely to be expecting to visit a casino during the next two years of travel than they were during the past two years.

Cultural and Entertainment Activities As Likely to Be Sought In Next Two Years As During the Past Two Years (Part 2 of 2)

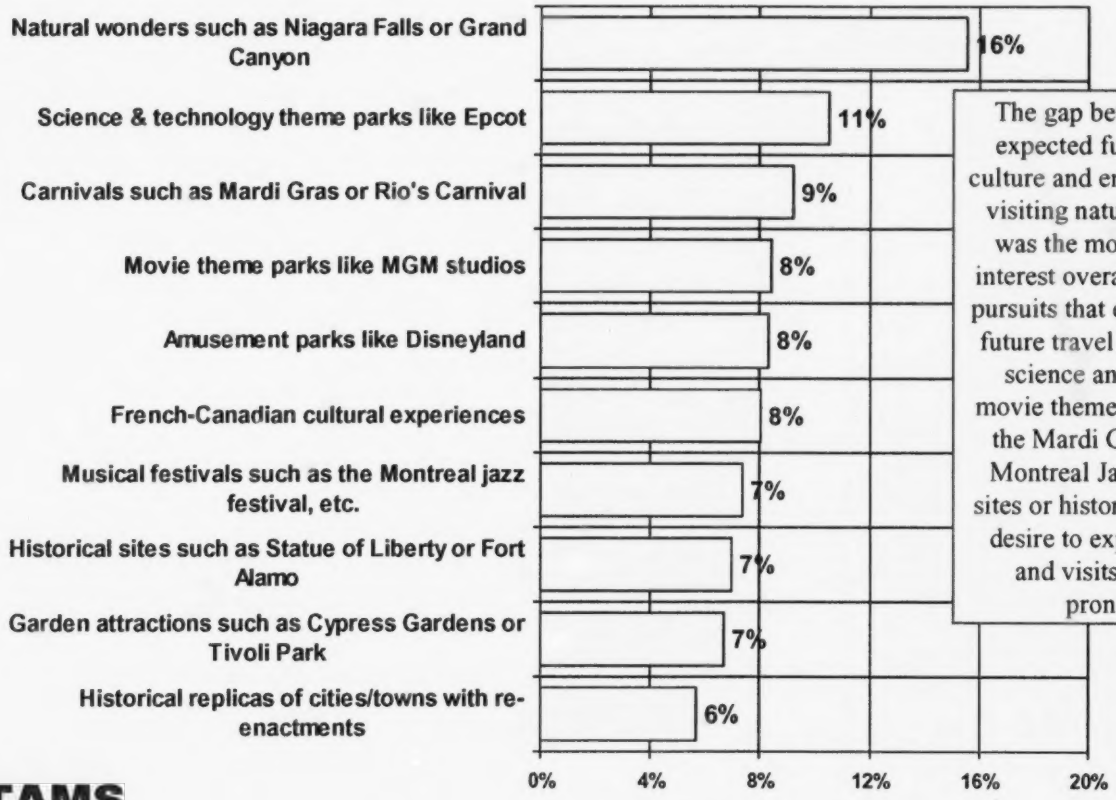
Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)



Cultural and Entertainment Vacation Activities More Likely To Be Done In Next Two Years Than Past Two Years

Change in Percent Likely to Do: Next Two Years Versus Past Two Years

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)



The gap between past participation rates and expected future participation rates for the 57 culture and entertainment activities indicates that visiting natural wonders such as Niagara Falls was the most pronounced emergent vacation interest overall. Other culture and entertainment pursuits that exhibit a high gap between past and future travel include visits to theme parks (e.g., science and technology, amusement parks, movie theme parks), attending carnivals such as the Mardi Gras or music festivals such as the Montreal Jazz festival, and visits to historical sites or historical replicas with re-enactments. A desire to experience French-Canadian culture and visits to garden attractions were also pronounced emergent interests.

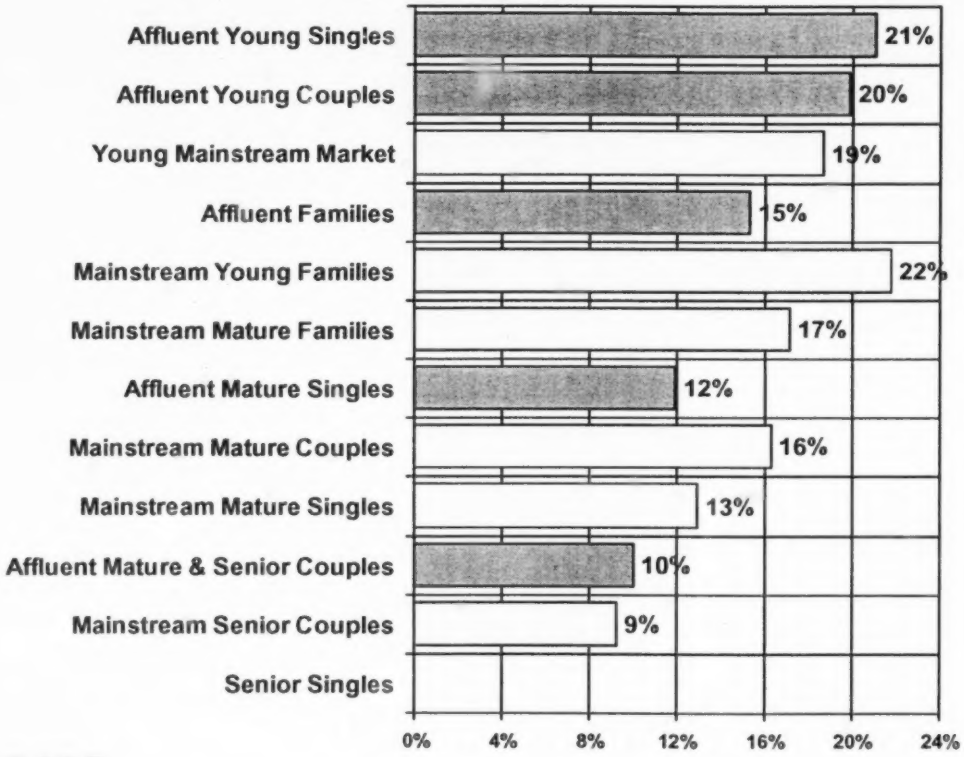
TAMS
Travel Activities & Motivation Survey

TAMS: Emergent Vacation Interests

Percent Net Change in Those Planning To Do Vacation Activity in Next Two Years
Relative to Those Having Done Activity in Past Two Years

Natural Sites Like Niagara Falls

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and
Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)



A visit to a natural site, such as Niagara Falls or the Grand Canyon, was the most pronounced emergent culture and entertainment interest observed in the TAMS research (out of 57 cultural and entertainment activities). This type of attraction exhibits wide market appeal, and was especially an emergent interest among younger travellers and Mainstream Young Families. The extent to which visits to natural sites was an emergent interest declined as the age of the traveller increased.

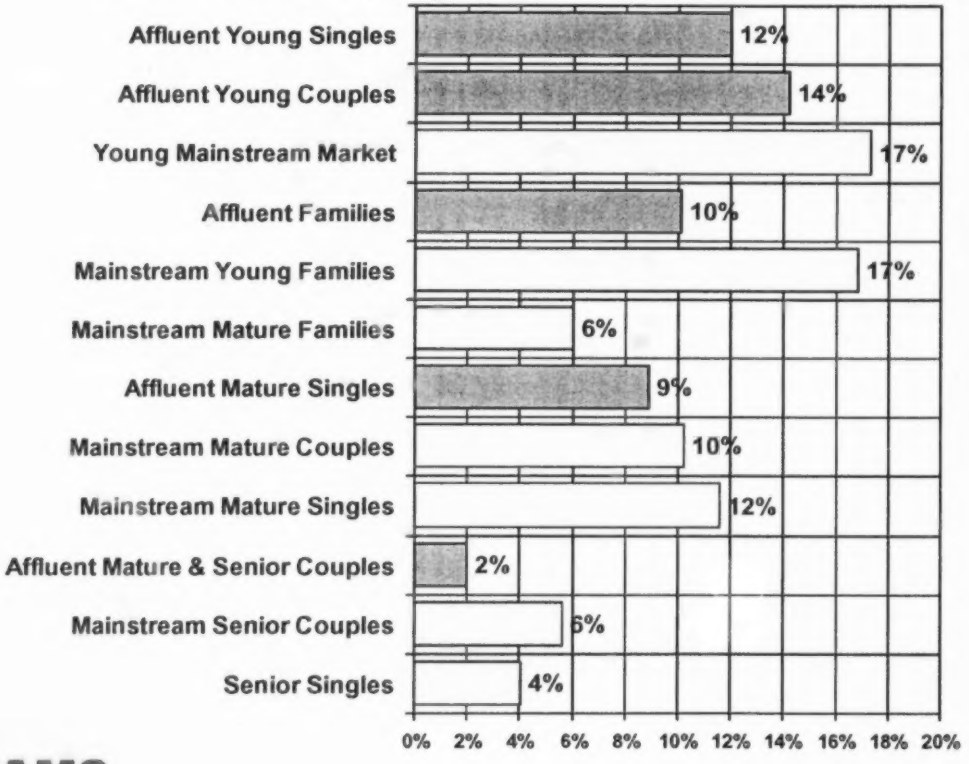
TAMS
Travel Activities & Motivation Survey

TAMS: Emergent Vacation Interests

Percent Net Change in Those Planning To Do Vacation Activity in Next Two Years
Relative to Those Having Done Activity in Past Two Years

Science and Technology Theme Parks

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and
Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)

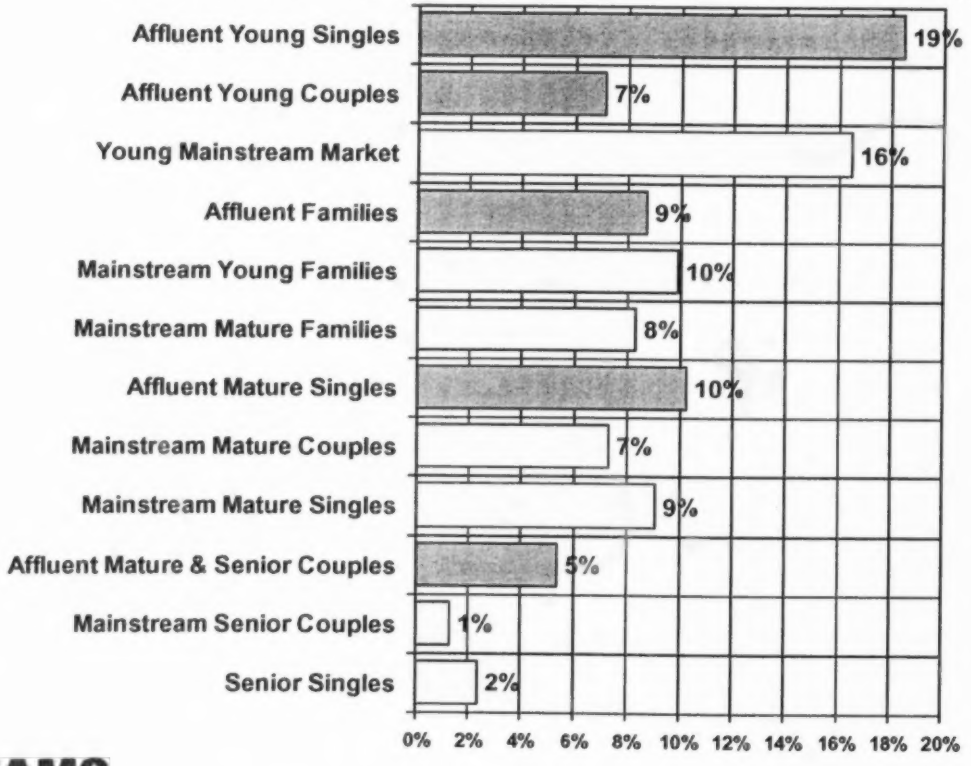


An emergent interest in science and technology theme parks was also broadly based across the market. This type of attraction was especially an emergent interest within the Youth segments, Mainstream Young Families and Mainstream Mature Singles. Note that the Affluent segments were more likely to have visited a science and technology theme park during the past two years of travel, and therefore less likely to have reported this as an emergent interest than were most of the five Mainstream segments.

Percent Net Change in Those Planning To Do Vacation Activity in Next Two Years
Relative to Those Having Done Activity in Past Two Years

Carnivals (e.g., Mardi Gras)

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and
Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)



An emergent interest in carnivals is most evident among Affluent Young Singles and the Young Mainstream Market. However, there was also a strong emergent interest for carnivals evident across all of the Youth, Family and Mature segments.

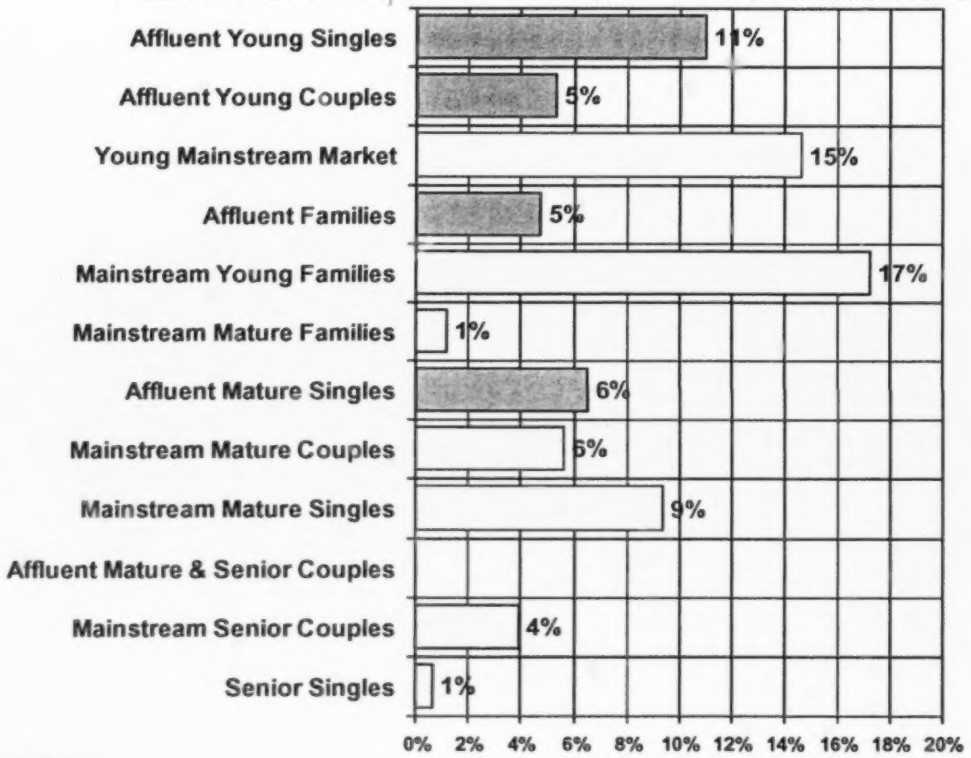
TAMS
Travel Activities & Motivation Survey

TAMS: Emergent Vacation Interests

Percent Net Change in Those Planning To Do Vacation Activity in Next Two Years
Relative to Those Having Done Activity in Past Two Years

Movie Theme Parks Like MGM

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and
Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)

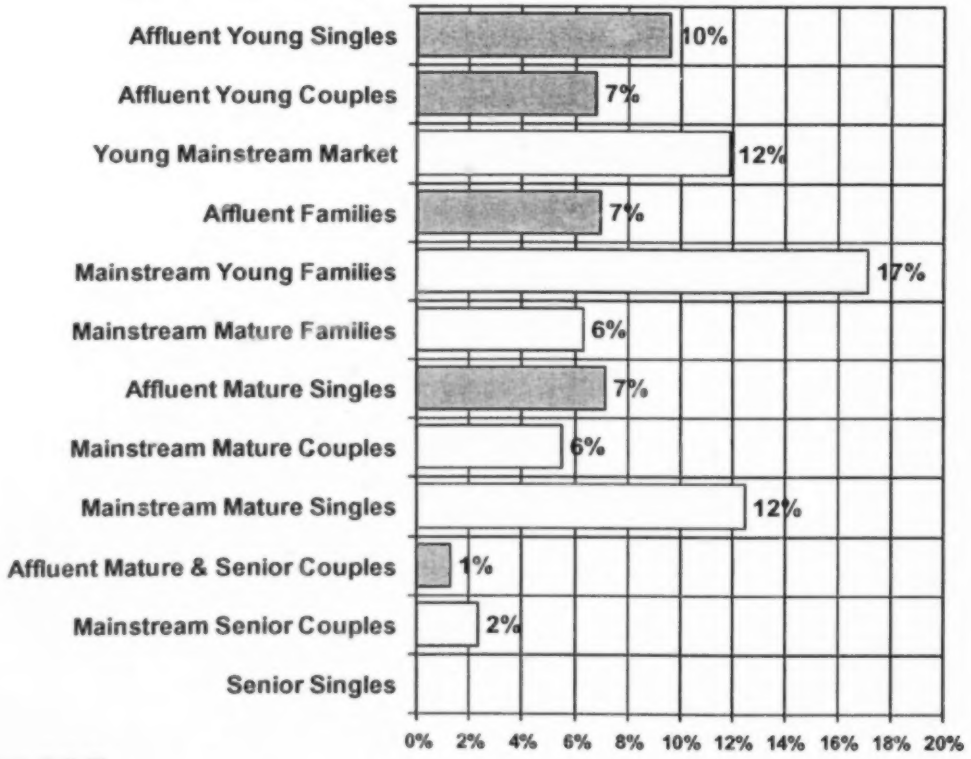


An emergent interest in movie theme parks is most apparent among Mainstream Young Families, the Young Mainstream Market and Affluent Young Singles. As with visits to science and technology theme parks, the Affluent segments were more likely to have visited a movie theme park during the past two years of travel, and therefore less likely to have reported this as an emergent interest than were the Mainstream segments.

Percent Net Change in Those Planning To Do Vacation Activity in Next Two Years
Relative to Those Having Done Activity in Past Two Years

Amusement Parks Like Disneyland

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and
Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)

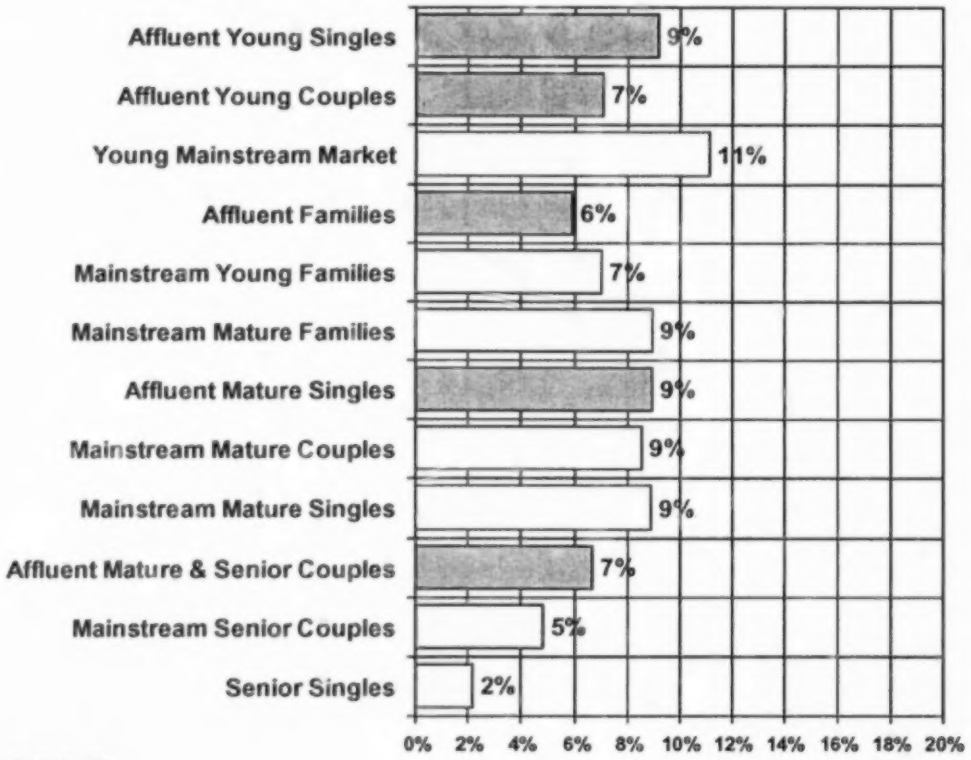


As with other theme parks, an emergent interest in amusement parks is most apparent among Mainstream Young Families, the Young Mainstream Market and Affluent Young Singles. The Mainstream Mature Singles also exhibited a particularly strong emergent interest in amusement parks relative to their past two years of travel.

Percent Net Change in Those Planning To Do Vacation Activity in Next Two Years
Relative to Those Having Done Activity in Past Two Years

French-Canadian Cultural Experiences

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and
Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)



An emergent interest in French-Canadian cultural experiences was apparent across the Youth, Family and Mature segments of the market. An emerging interest in this type of vacation experience was especially evident within the Young Mainstream Market.

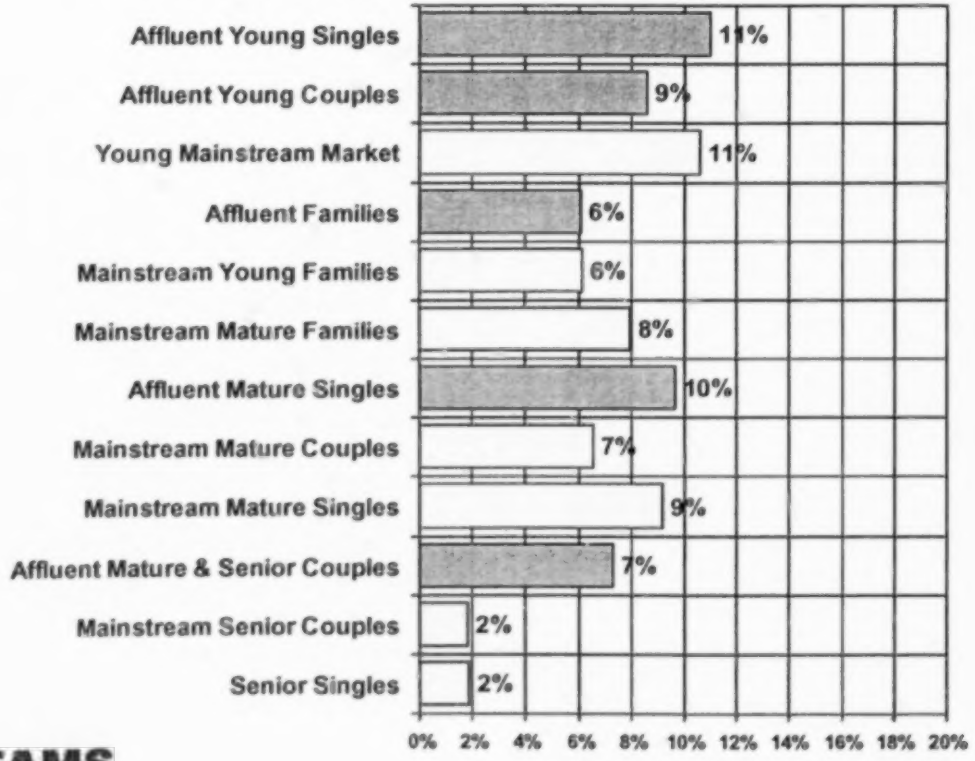
TAMS
Travel Activities & Motivation Survey

TAMS: Emergent Vacation Interests

Percent Net Change in Those Planning To Do Vacation Activity in Next Two Years
Relative to Those Having Done Activity in Past Two Years

Musical Festivals Like Montreal Jazz Festival

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and
Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)



An emergent interest in musical festivals, such as the Montreal Jazz Festival, was relatively uniform across the Youth, Family and Mature segments of the market. The Single segments (i.e., Affluent Young Singles, Young Mainstream Market, Affluent Mature Singles and Mainstream Mature Singles) were especially likely to exhibit an emergent interest in this type of festival.

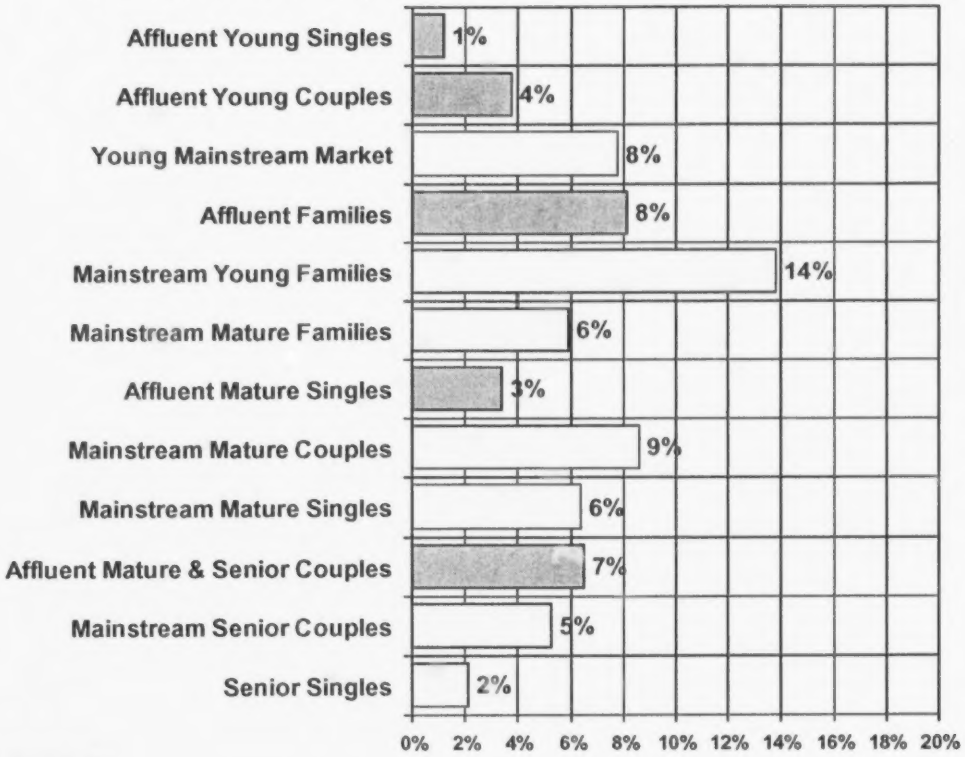
TAMS
Travel Activities & Motivation Survey

TAMS: Emergent Vacation Interests

Percent Net Change in Those Planning to Do Vacation Activity in Next Two Years
Relative to Those Having Done Activity in Past Two Years

Historical Sites Like Fort Alamo

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and
Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)



Mainstream Young Families were clearly the most likely to exhibit an emergent interest in visiting historical sites such as the Alamo. Historical sites also were more likely to be an emergent interest among the Young Mainstream Market, Affluent Families and Mainstream Mature Couples.

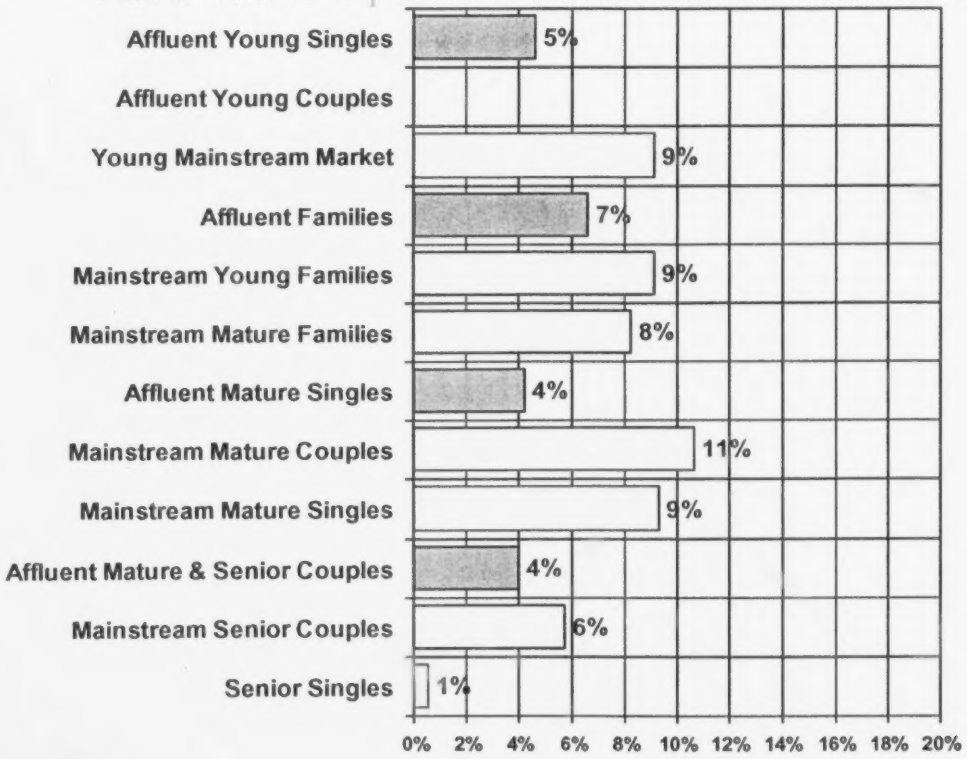
TAMS
Travel Activities & Motivation Survey

TAMS: Emergent Vacation Interests

Percent Net Change in Those Planning to Do Vacation Activity in Next Two Years
Relative to Those Having Done Activity in Past Two Years

Garden Attractions Like Cypress Gardens

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and
Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)

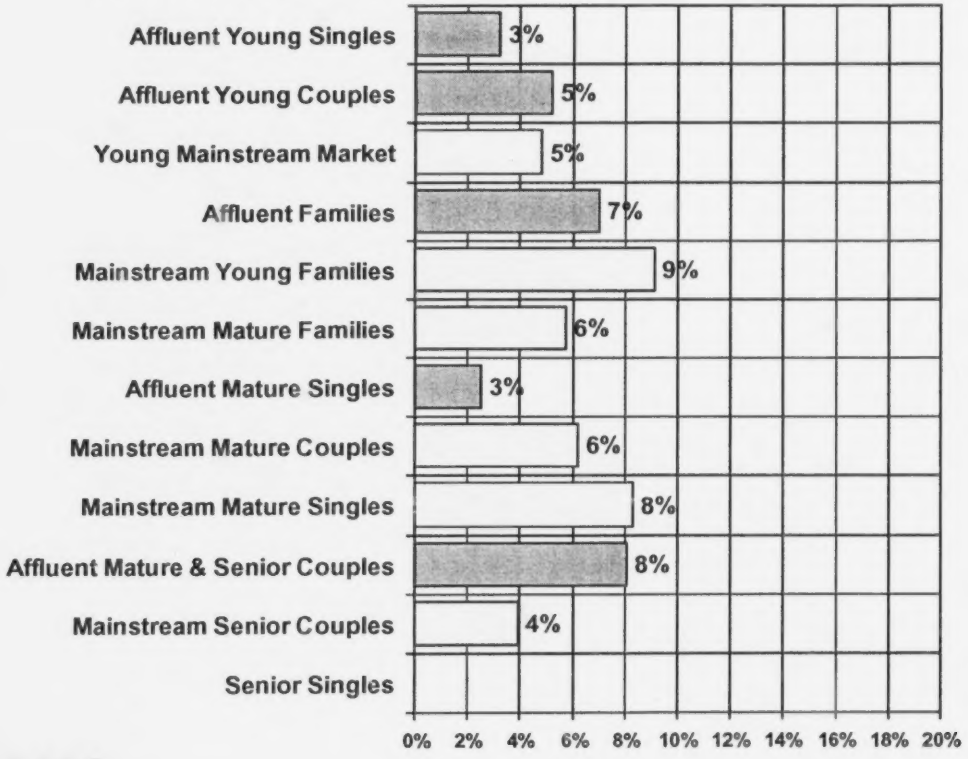


Garden attractions were most likely to be an emergent cultural attraction among the Mainstream Mature Couples. The Young Mainstream Market, Mainstream Young Families, Mainstream Mature Families and Mainstream Mature Singles also were more likely to visit garden attractions during the next two years of travel relative to the past two years. Since the Affluent segments were more likely to have visited a garden attraction during the past two years of travel, they were less likely to have reported this as an emergent interest than were the Mainstream segments.

Percent Net Change in Those Planning to Do Vacation Activity in Next Two Years
Relative to Those Having Done Activity in Past Two Years

Historical Replicas with Re-enactments

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and
Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)



An emergent interest in historical replicas with re-enactments was most apparent within the Mainstream Young Family segment. Mainstream Mature Singles and Mainstream Mature Couples also were more likely to report an interest in seeing historical replicas during the next two years of travel than during the past two years.

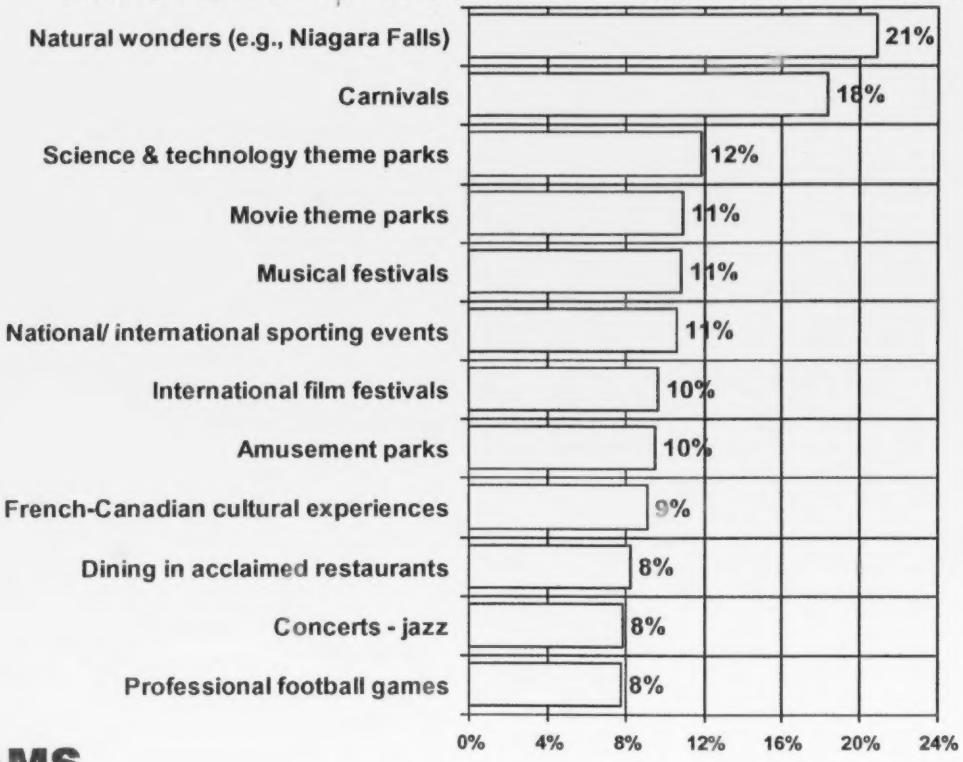
TAMS
Travel Activities & Motivation Survey

TAMS: Emergent Vacation Interests

Percent Net Change in Those Planning to Do Activity in Next Two Years
Minus Those Having Done Activity in Past Two Years

Top 12 Emergent Cultural and Entertainment Interests — Young Affluent Singles

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and
Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)



The Young Affluent Singles exhibited the greatest emergent interest in seeing natural wonders such as Niagara Falls or the Grand Canyon. They also exhibited a high emergent interest in carnivals. Theme parks (i.e., science and technology, movie, amusement), festivals (musical, film) and sporting events (e.g., national/international, football) were also pronounced emergent interests within this segment. Note that most of these attractions and events are high-energy experiences suggesting that this segment is drawn to excitement and stimulation when on vacation.

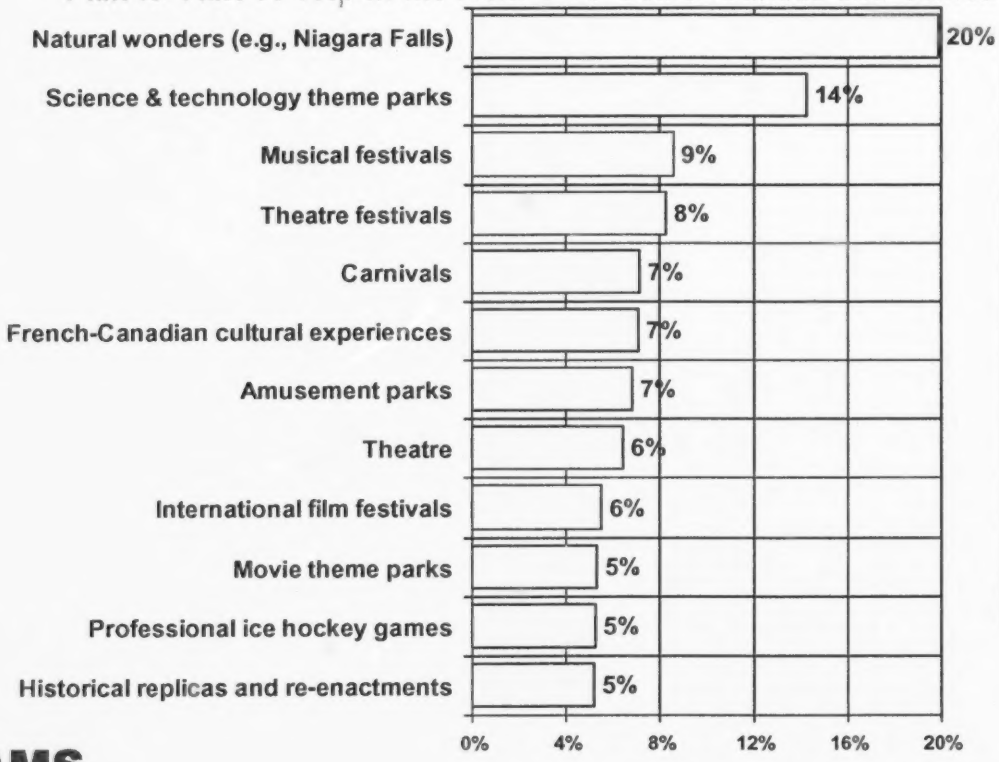
TAMS
Travel Activities & Motivation Survey

TAMS: Emergent Vacation Interests

Percent Net Change in Those Planning to Do Activity in Next Two Years
Minus Those Having Done Activity in Past Two Years

Top 12 Emergent Cultural and Entertainment Interests — Young Affluent Couples

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)



The Young Affluent Couples exhibit similar emergent interests to those of the Affluent Young Singles. They exhibited the greatest emergent interest in seeing natural wonders such as Niagara Falls or the Grand Canyon. They also exhibited emergent interests in theme parks (i.e., science and technology, movie, amusement), festivals (musical, theatre, film), carnivals and French-Canadian cultural experiences. However, since this segment is unencumbered by children and is relatively affluent, they are better able to have participated in most culture and entertainment pursuits of interest during the past two years of travel. As such, they are less likely to exhibit emergent interests than either the Affluent Young Singles or the Young Mainstream Market.

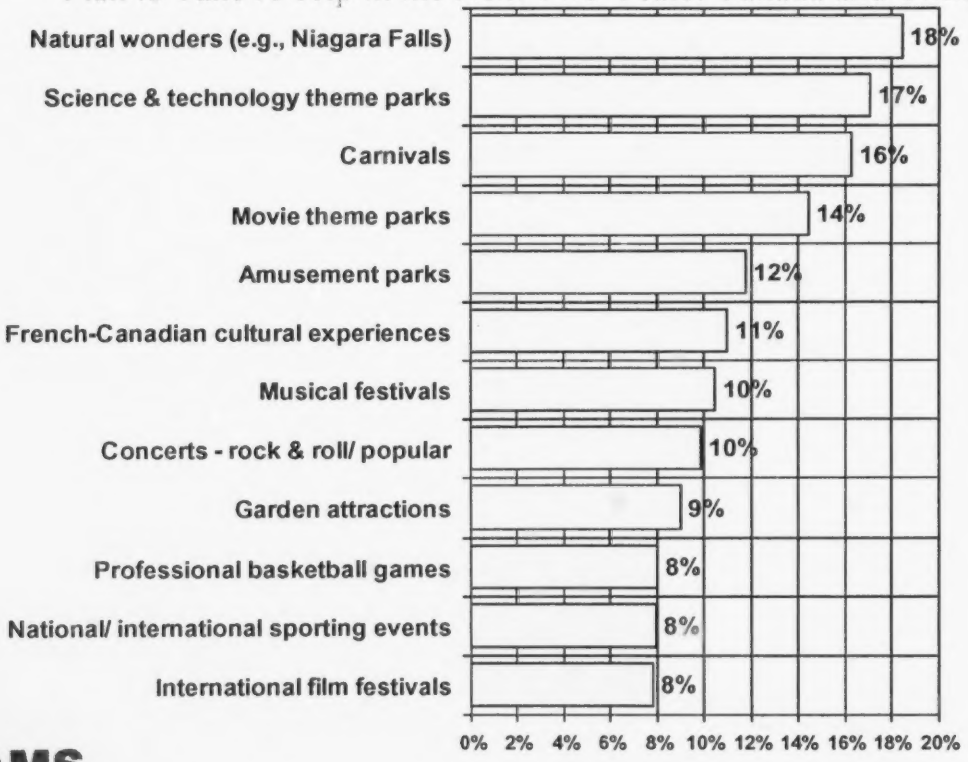
TAMS
Travel Activities & Motivation Survey

TAMS: Emergent Vacation Interests

Percent Net Change in Those Planning to Do Activity in Next Two Years
Minus Those Having Done Activity in Past Two Years

Top 12 Emergent Cultural and Entertainment Interests — Young Mainstream Market

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and
Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)

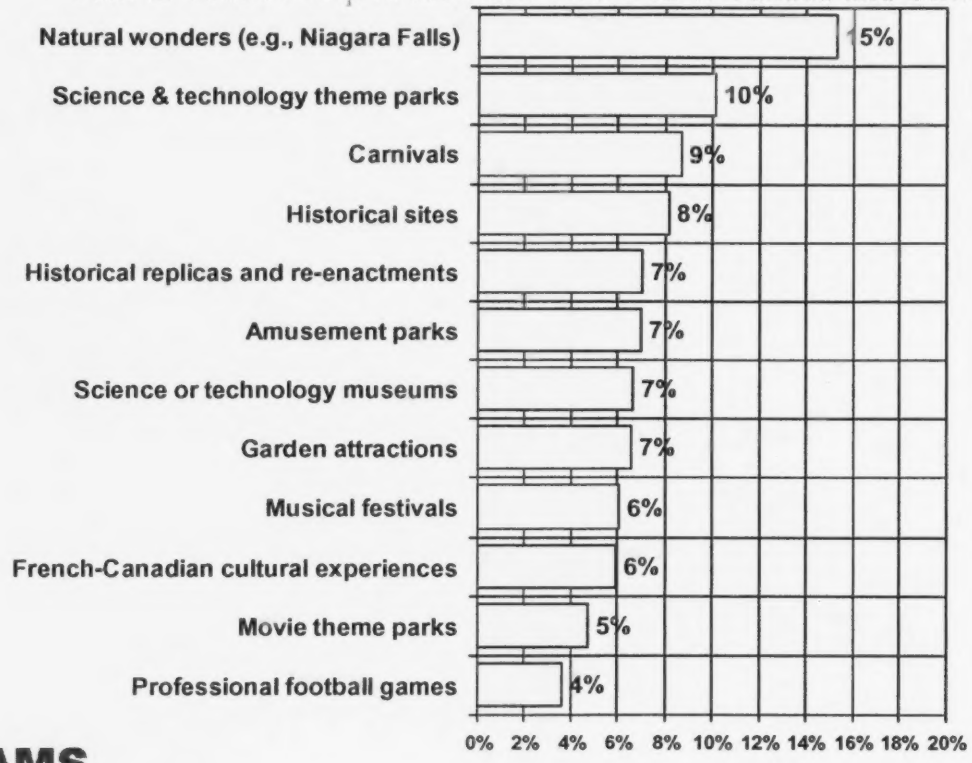


The Young Mainstream Market exhibited the largest number of emergent interests of any segment. They were especially interested in seeing natural wonders such as Niagara Falls or the Grand Canyon, carnivals, theme parks (i.e., science and technology, movie, amusement), festivals (musical, film) and sporting events (e.g., national/international, football). Similar to the Affluent Young Singles, the Young Mainstream Market appears drawn to high-energy experiences when on vacation.

Percent Net Change in Those Planning to Do Activity in Next Two Years
Minus Those Having Done Activity in Past Two Years

Top 12 Emergent Cultural and Entertainment Interests — Affluent Families

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and
Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)



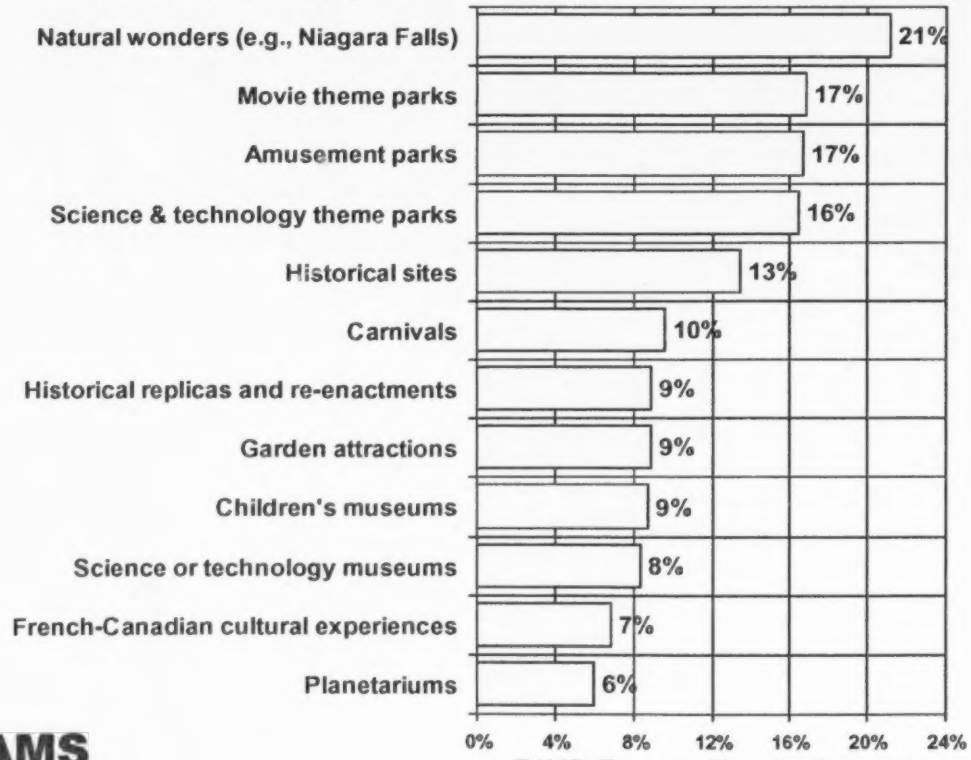
TAMS: Emergent Vacation Interests

The Affluent Families exhibited the greatest emergent interest in seeing natural wonders such as Niagara Falls or the Grand Canyon. They also exhibited a high emergent interest in theme parks (i.e., science and technology, movie, amusement), carnivals, musical festivals, garden attractions and French-Canadian cultural experiences. In contrast to the Youth segments, Affluent Families also exhibited a greater emergent interest in historical sites and historical re-enactments.

Percent Net Change in Those Planning to Do Activity in Next Two Years
Minus Those Having Done Activity in Past Two Years

Top 12 Emergent Cultural and Entertainment Interests — Mainstream Young Families

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and
Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)



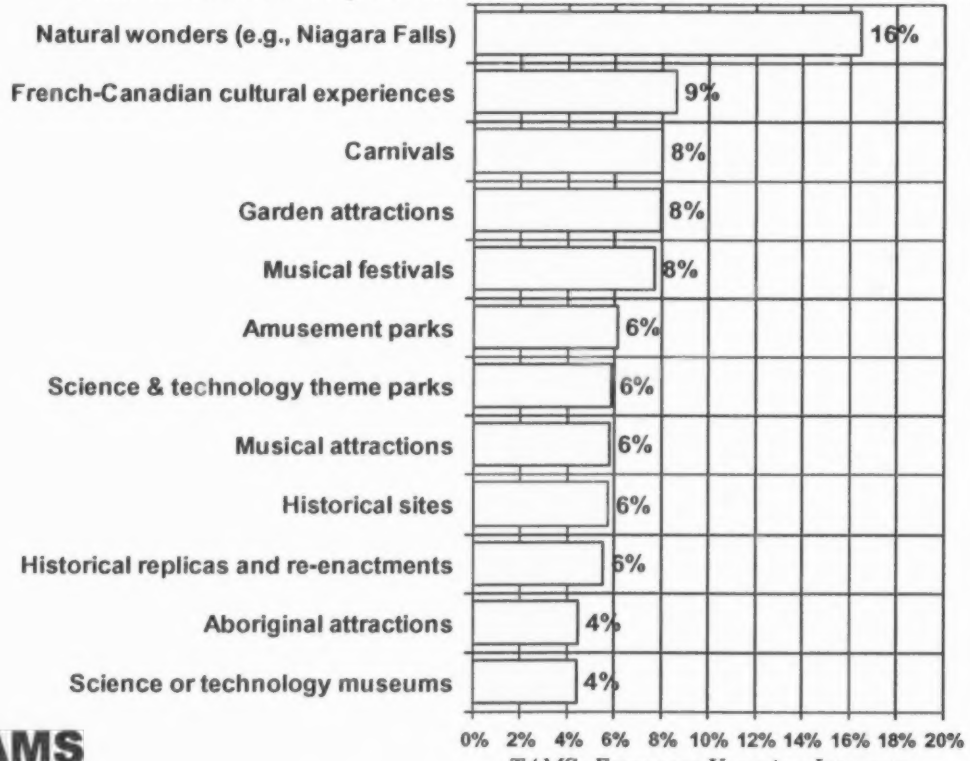
TAMS: Emergent Vacation Interests

Similar to the Young Mainstream Market, the Mainstream Young Families exhibited a large number of emergent culture and entertainment interests. They were especially interested in seeing natural wonders, such as Niagara Falls or the Grand Canyon, and theme parks (i.e., science and technology, movie, amusement). They also exhibited an emergent interest in historical sites and historical en-enactments, carnivals, garden attractions, children's museums, planetariums and French-Canadian cultural experiences. Note that most of the emergent interest of this segment pertain to attractions that are suitable for smaller children.

Percent Net Change in Those Planning to Do Activity in Next Two Years
Minus Those Having Done Activity in Past Two Years

Top 12 Emergent Cultural and Entertainment Interests — Mainstream Mature Families

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and
Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)



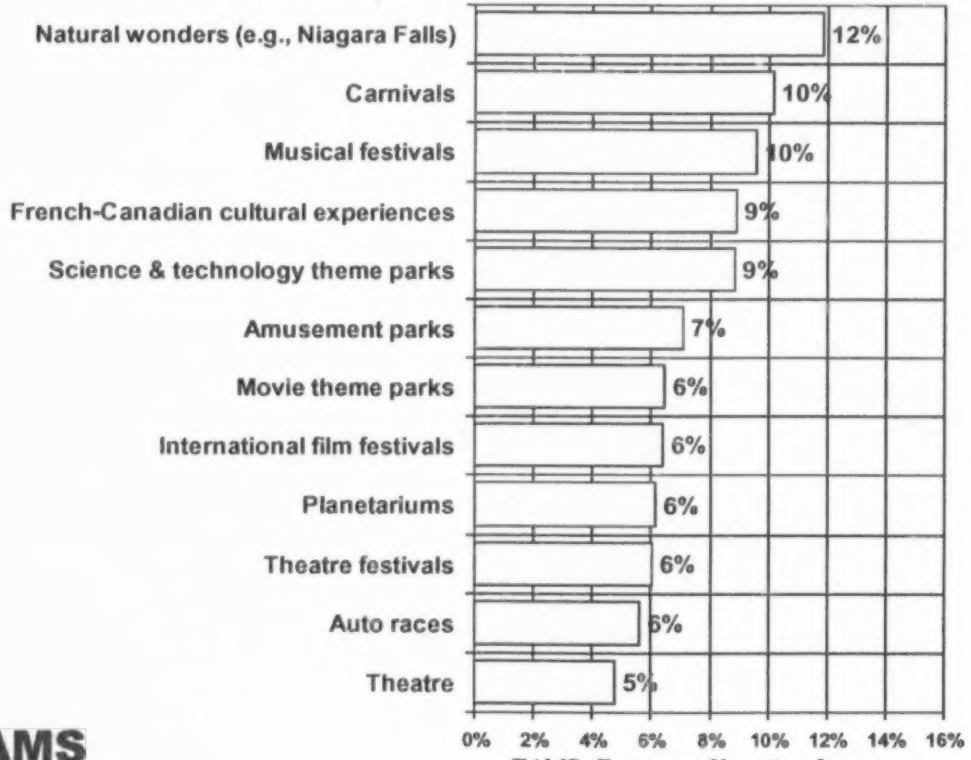
TAMS: Emergent Vacation Interests

The Mainstream Mature Family segment was especially interested in seeing natural wonders such as Niagara Falls or the Grand Canyon. They also exhibited an emergent interest in carnivals, musical festivals, theme parks (amusement, science and technology), garden attractions, and historical sites or historical replicas with re-enactments.

Percent Net Change in Those Planning to Do Activity in Next Two Years
Minus Those Having Done Activity in Past Two Years

Top 12 Emergent Cultural and Entertainment Interests — Affluent Mature Singles

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)



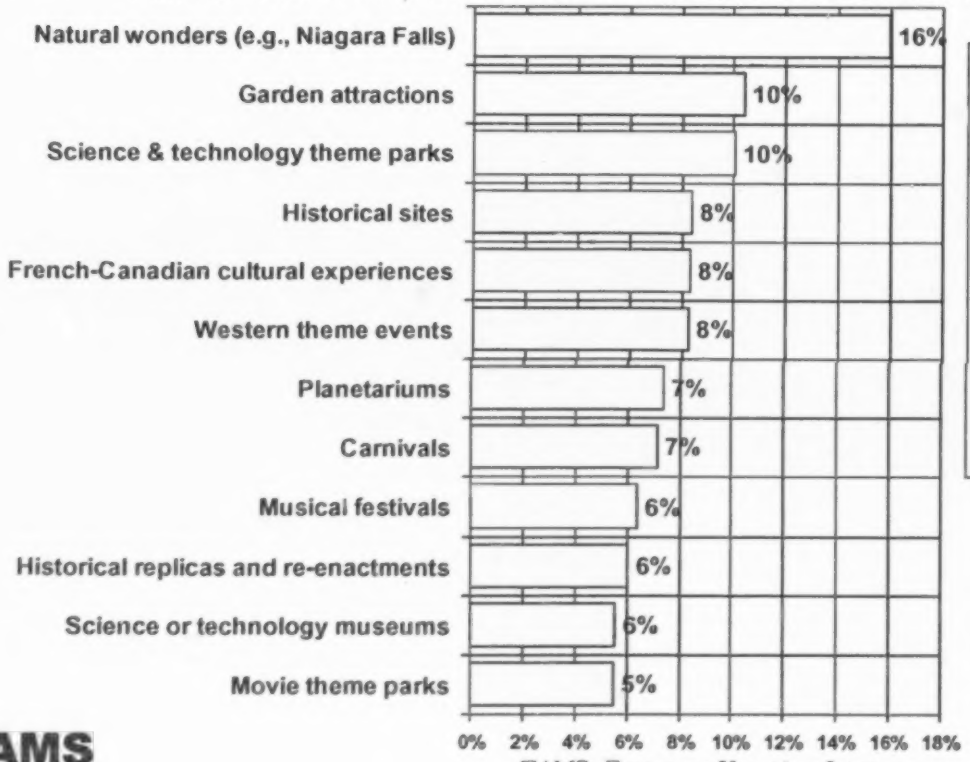
TAMS: Emergent Vacation Interests

As with most other segments, Affluent Mature Singles exhibited the most pronounced emergent interest in seeing natural sites such as Niagara Falls and the Grand Canyon. They also exhibited emergent interest in carnivals, festivals (musical, film, theatre), theme parks (amusement, movie, science and technology), French-Canadian cultural experiences, planetariums, auto racing and live theatre. Note that the emergent interest of the segment tend to be social and culturally oriented.

Percent Net Change in Those Planning to Do Activity in Next Two Years
Minus Those Having Done Activity in Past Two Years

Top 12 Emergent Cultural and Entertainment Interests — Mainstream Mature Couples

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and
Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)



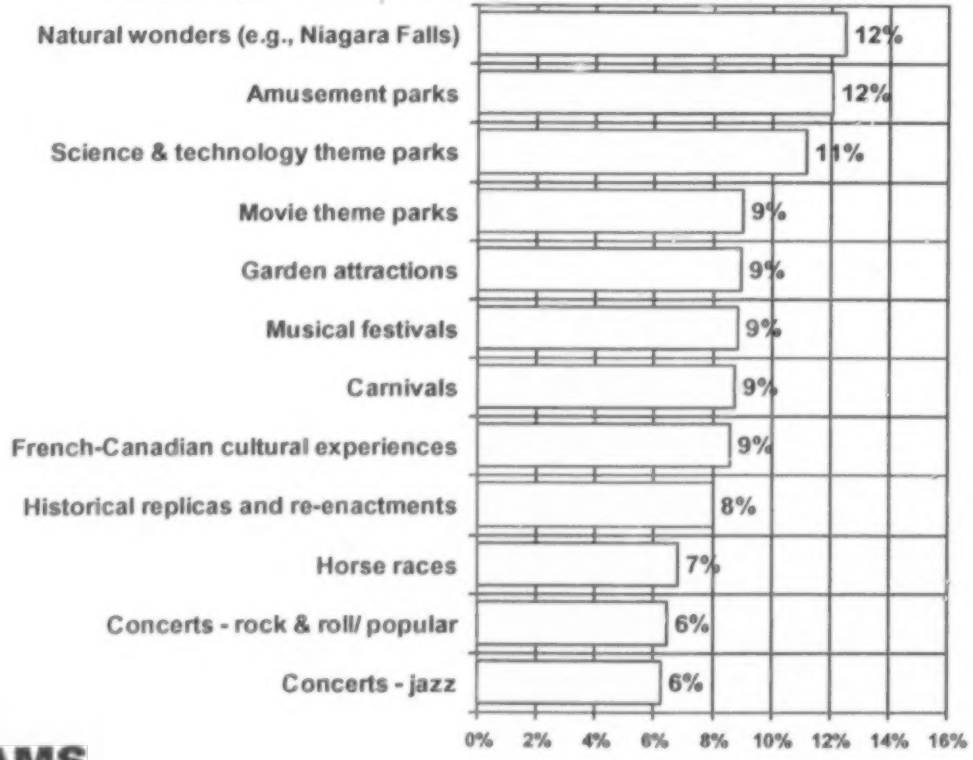
TAMS: Emergent Vacation Interests

Mainstream Mature Couples exhibited the most pronounced emergent interest in seeing natural sites such as Niagara Falls and the Grand Canyon. They also exhibited emergent interest in garden attractions, theme parks (movie, science and technology), historical sites and historical replicas with re-enactments, French-Canadian cultural experiences, western theme events, *planetariums, music festivals,* and science and technology museums. The emergent interests of Mainstream Mature Couples tend to more cultural than entertainment-oriented.

Percent Net Change in Those Planning to Do Activity in Next Two Years
Minus Those Having Done Activity in Past Two Years

Top 12 Emergent Cultural and Entertainment Interests — Mainstream Mature Singles

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and
Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)

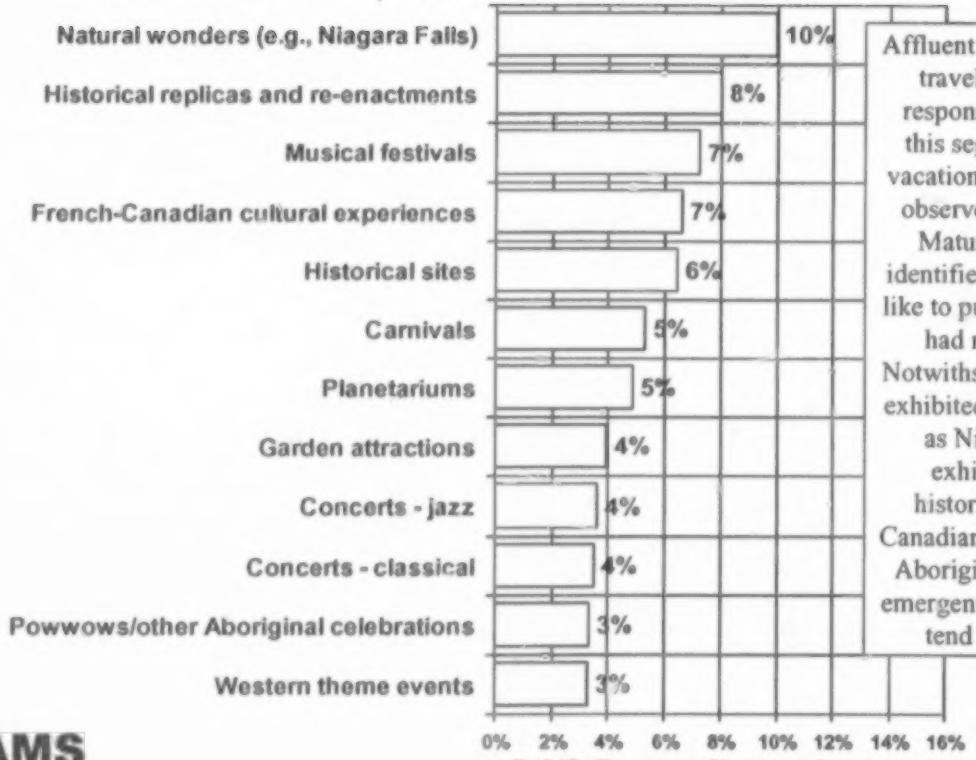


Mainstream Mature Singles exhibited the most pronounced emergent interest in seeing natural sites (e.g., Niagara Falls) and theme parks (e.g., amusement, movie, science and technology). They also exhibited emergent interests in events such as musical festivals, rock and roll concerts, jazz concerts and carnivals. Garden attractions, historical replicas with en-enactments, French-Canadian cultural experiences and horse racing also were emergent interests within this segment. The emergent interests of Mainstream Mature Singles tend to be more high-energy and social than those of the two Mature Couple segments.

Percent Net Change in Those Planning to Do Activity in Next Two Years
Minus Those Having Done Activity in Past Two Years

Top 12 Emergent Cultural and Entertainment Interests — Affluent Mature and Senior Couples

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)



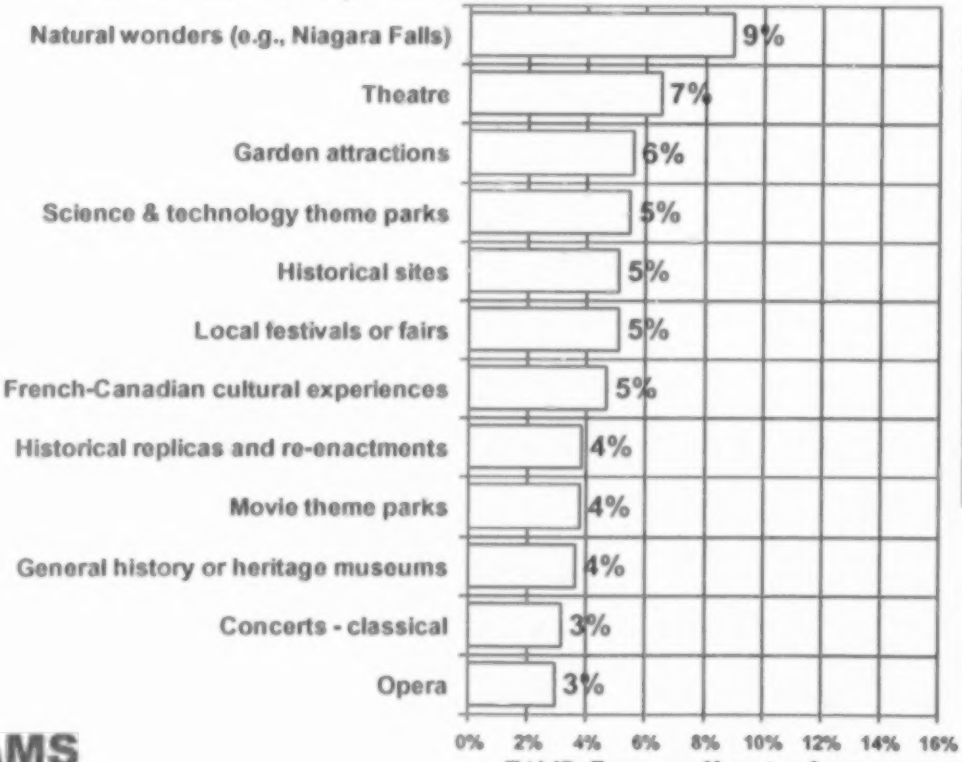
TAMS: Emergent Vacation Interests

Affluent Mature and Senior Couples are the most frequent travellers in the market. Unencumbered by parental responsibilities and enjoying relatively high affluence, this segment appears better able to have satisfied their vacation interests during the past two years. Thus, as was observed with outdoor vacation activities, the Affluent Mature and Senior Couples were less likely to have identified culture and entertainment activities they would like to pursue during the next two years of travel that they had not already pursued during the past two years. Notwithstanding, the Affluent Mature and Senior Couples exhibited an emergent interest in seeing natural sites such as Niagara Falls and the Grand Canyon. They also exhibited emergent interest in historical sites and historical re-enactments, garden attractions, French-Canadian cultural experiences, jazz and classical concerts, Aboriginal celebrations, and western theme events. The emergent interests of Affluent Mature and Senior Couples tend to more cultural than entertainment-oriented.

Percent Net Change in Those Planning to Do Activity in Next Two Years Minus Those Having Done Activity in Past Two Years

Top 12 Emergent Cultural and Entertainment Interests — Mainstream Senior Couples

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)



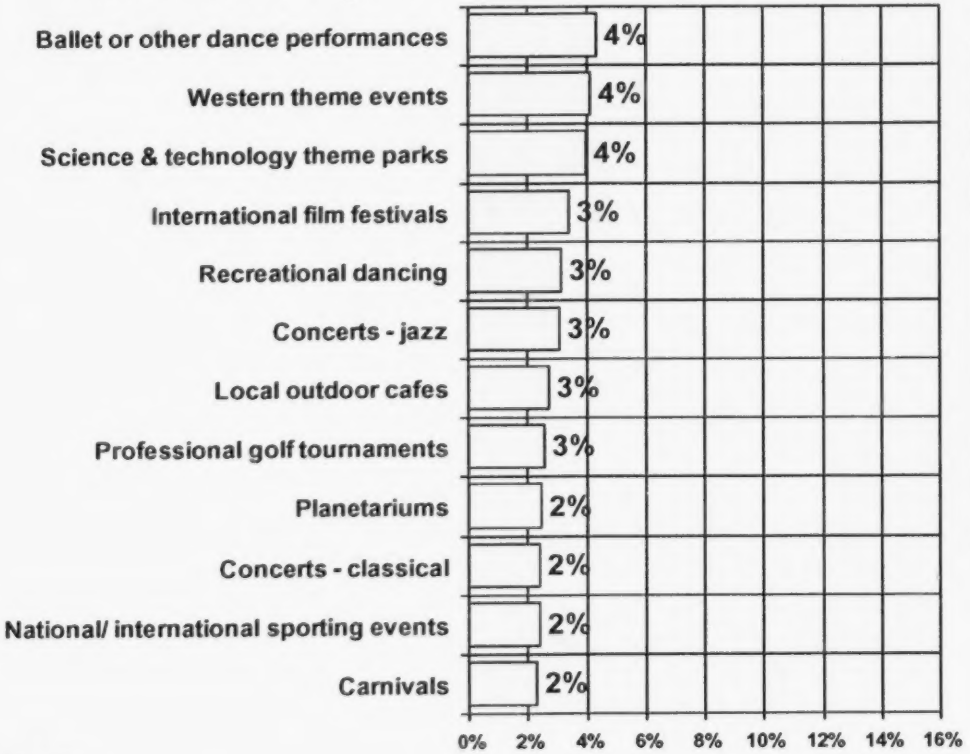
TAMS: Emergent Vacation Interests

The Mainstream Senior Couples have fewer emergent culture and entertainment interests than the younger segments. However, they do exhibit emergent interests in natural sites (e.g., Niagara Falls), the high arts (theatre, classical concerts, opera), historical sites and historical replicas with re-enactments, garden attractions, French-Canadian cultural experiences, and local festivals and fairs. They also exhibit an emergent interest in historical and heritage museums, and movie theme parks. The emergent interests of the Mainstream Senior Couples tend to be lower-energy attractions, events or activities with a cultural theme.

Percent Net Change in Those Planning to Do Activity in Next Two Years
Minus Those Having Done Activity in Past Two Years

Top 12 Emergent Cultural and Entertainment Interests — Senior Singles

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and
Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)



The Mainstream Senior Singles have the fewest emergent culture and entertainment interests of any segment. However, they do exhibit an emergent interest in seeing arts performances (e.g., dance performances, classical concerts, jazz concerts), an international film festival, professional sporting events (e.g., international sporting events, professional golf tournaments) and planetariums. They also showed emergent interests in recreational dancing and local outdoor cafés. The emergent interests of the Mainstream Senior Seniors tend to be lower-energy attractions, and events or activities with a cultural theme.

TAMS
Travel Activities & Motivation Survey

TAMS: Emergent Vacation Interests

Section Five

Emergent Activity-Related Accommodations Travel Interests

Emergent Activity-Related Accommodations Travel Interests

- Research Method -

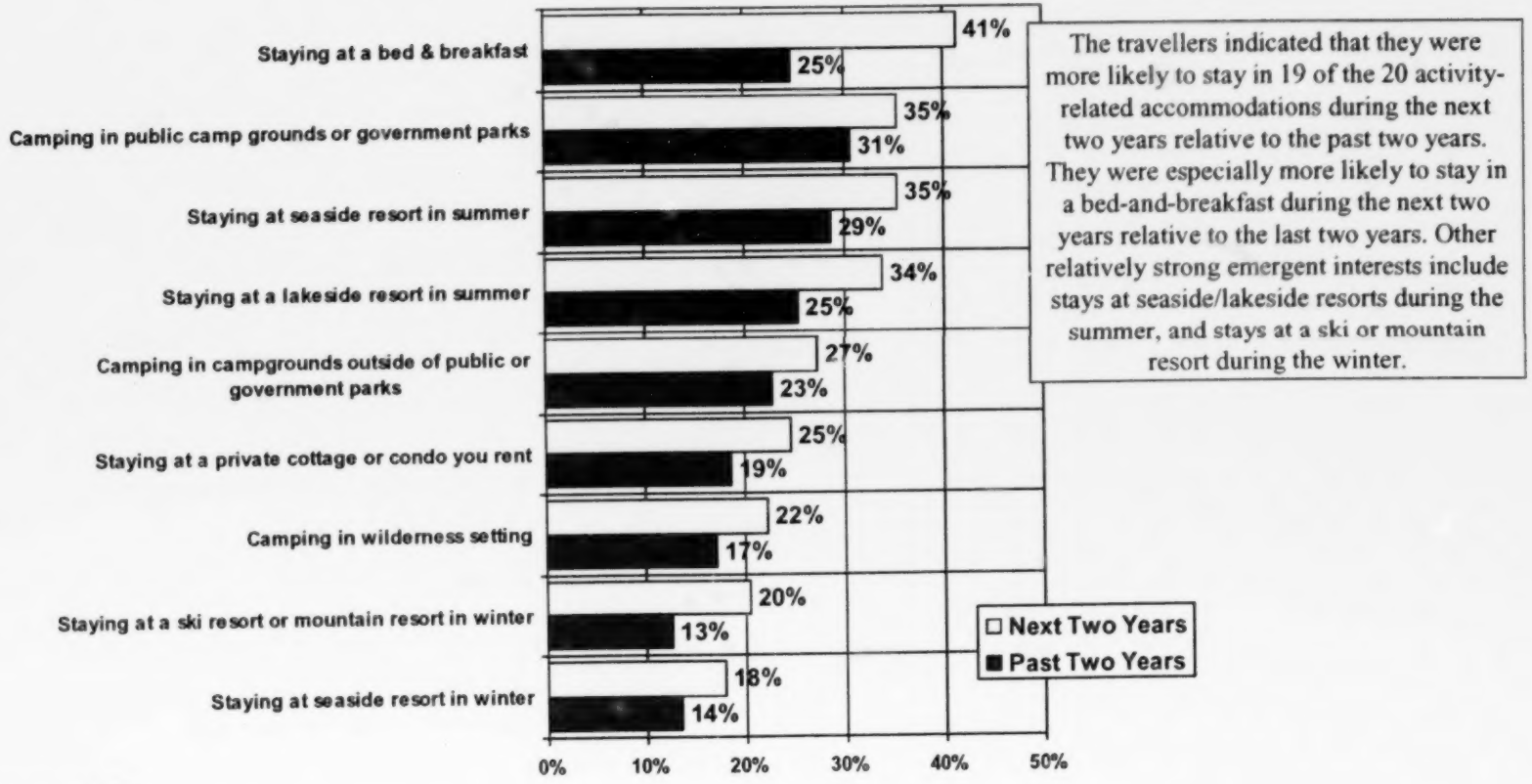
In the mailback survey, those who had taken a trip during the past two years were asked which of 20 types of accommodations they had stayed in during the last two years of travel that were closely associated with specific types of activities (e.g., skiing, camping, cooking).

They also were asked which of these same activity-related accommodations they were likely to stay in over the course of the next two years while travelling.

The difference in the percent who had stayed in each type of activity-based accommodation during the past two years and the percent who planned to stay in each type of activity-based accommodation during the next two years was used as a gauge of the extent to which each type of activity-related accommodations was an emergent travel interest.

Activity-Related Accommodations More Likely To Be Stayed In During Next Two Years Relative To The Past Two Years (Part 1 of 2)

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey).

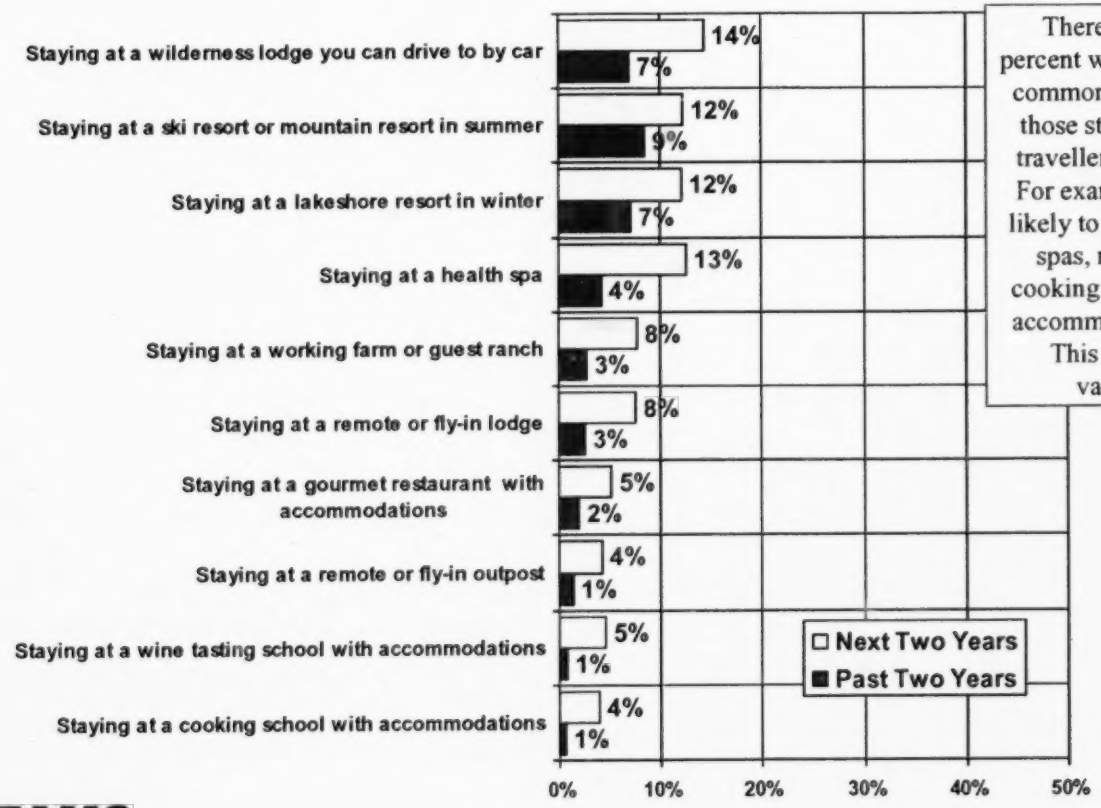

Staying at a bed & breakfast
41%
25%
Camping in public camp grounds or government parks
35%
31%
Staying at seaside resort in summer
35%
29%
Staying at a lakeside resort in summer
34%
25%
Camping in campgrounds outside of public or government parks
27%
23%
Staying at a private cottage or condo you rent
25%
19%
Camping in wilderness setting
22%
17%
Staying at a ski resort or mountain resort in winter
20%
13%
Staying at seaside resort in winter
18%
14%
0%
10%
20%
30%
40%
50%
Next Two Years
Past Two Years
The travellers indicated that they were more likely to stay in 19 of the 20 activity-related accommodations during the next two years relative to the past two years. They were especially more likely to stay in a bed-and-breakfast during the next two years relative to the last two years. Other relatively strong emergent interests include stays at seaside/lakeside resorts during the summer, and stays at a ski or mountain resort during the winter.

TAMS
Travel Activities & Motivation Survey

TAMS: Emergent Vacation Interests

Activity-Related Accommodations More Likely To Be Stayed In During Next Two Years Relative To The Past Two Years (Part 2 of 2)

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey).



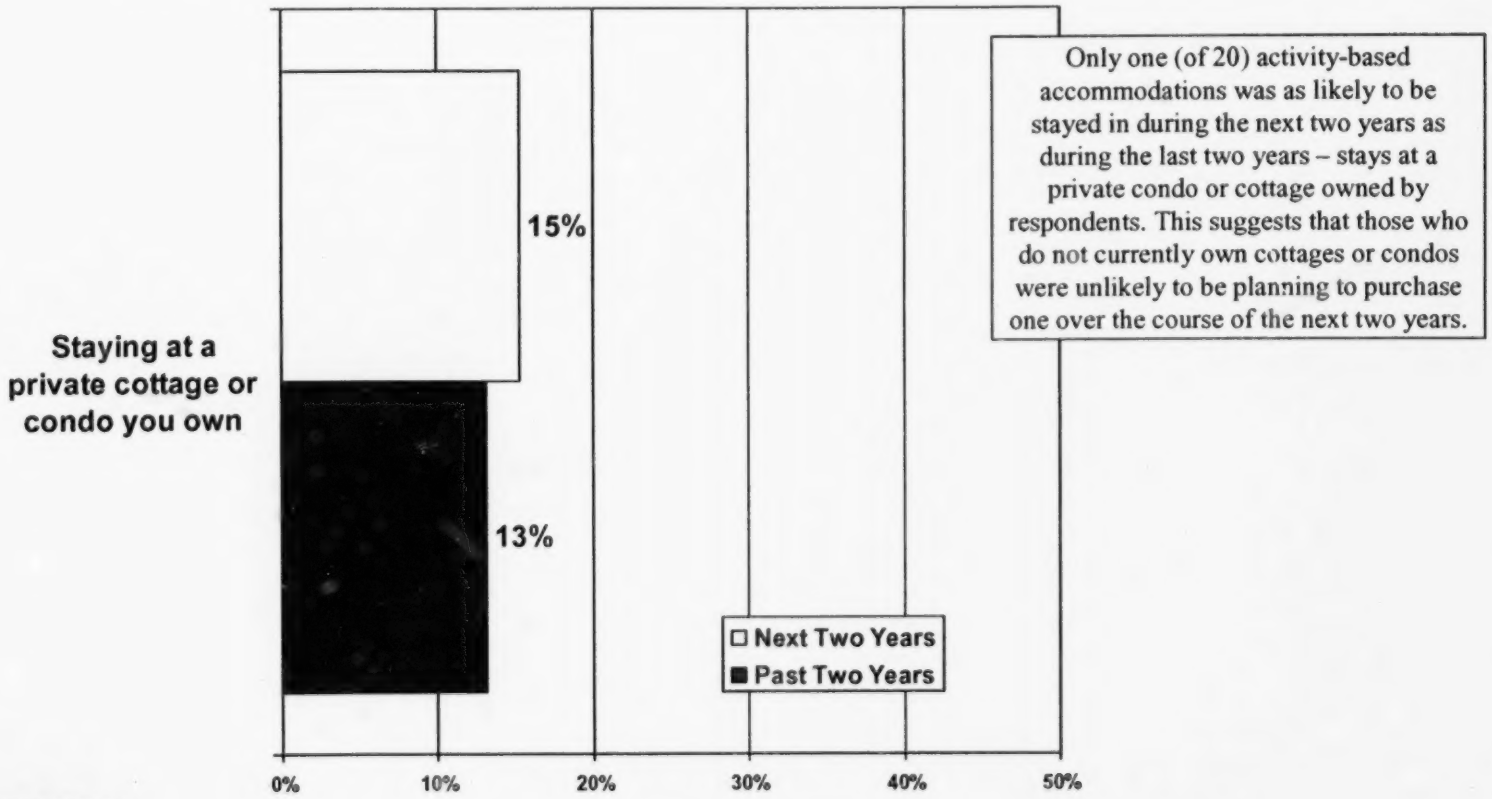
There were considerable increases in the percent who reported being interested in the less common activity-based accommodations (i.e., those stayed in by less than 10 percent of the travellers during the past two years of travel). For example, respondents were three times as likely to express an interest in staying at health spas, remote fly-in lodges, wine tasting or cooking schools, and gourmet restaurants with accommodations relative to the last two years. This suggests that more exotic forms of vacation travel are on the increase.

TAMS
Travel Activities & Motivation Survey

TAMS: Emergent Vacation Interests

Activity-Related Accommodations As Likely to Be Stayed In During Next Two Years As During the Past Two Years

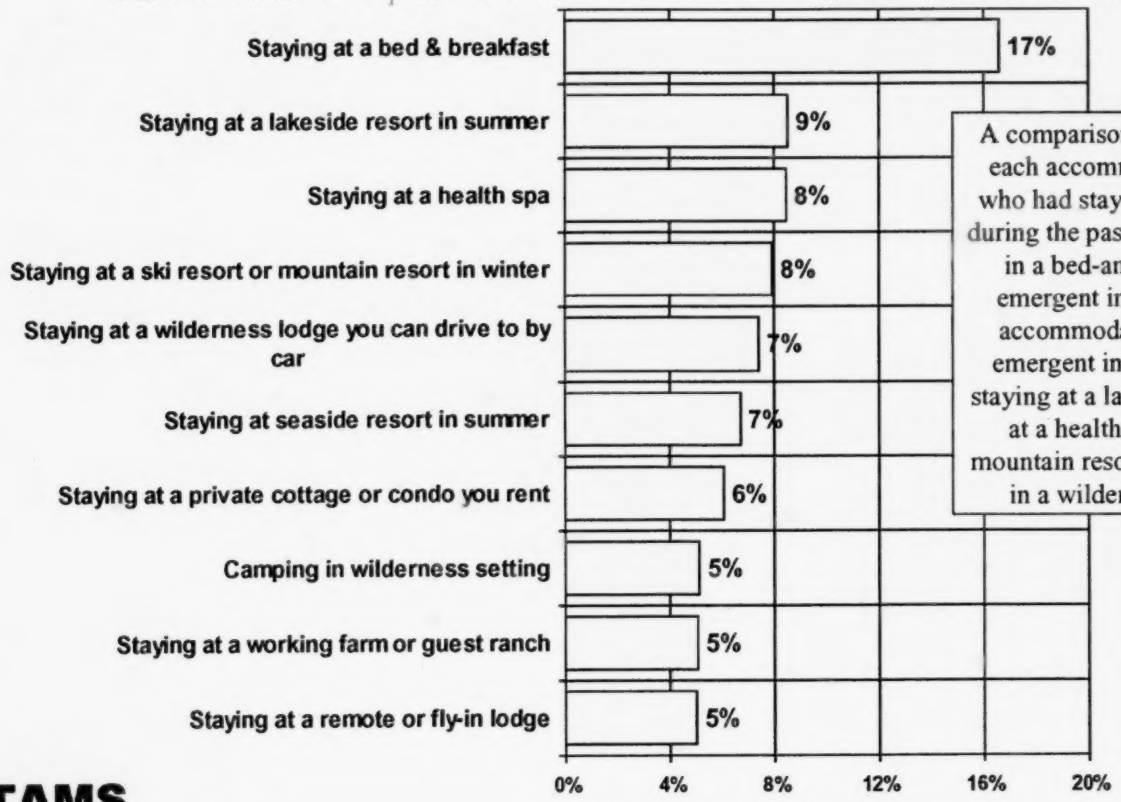
Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey).


Staying at a private cottage or condo you own
15%
13%
Next Two Years
Past Two Years
0%
10%
20%
30%
40%
50%
Only one (of 20) activity-based accommodations was as likely to be stayed in during the next two years as during the last two years – stays at a private condo or cottage owned by respondents. This suggests that those who do not currently own cottages or condos were unlikely to be planning to purchase one over the course of the next two years.

Activity-Related Accommodations More Likely To Stay In During Next Two Years Than Past Two Years

Change in Percent Likely to Stay: Next Two Years Versus Past Two Years

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey).



A comparison of the percent likely to stay in each accommodation type with the percent who had stayed in each accommodation type during the past two years indicates that staying in a bed-and-breakfast was the strongest emergent interest of the 20 activity-based accommodations examined. Other strong emergent interests in this category include staying at a lakeside resort in summer, staying at a health spa, staying at a ski resort or mountain resort during the winter, and staying in a wilderness lodge accessible by car.

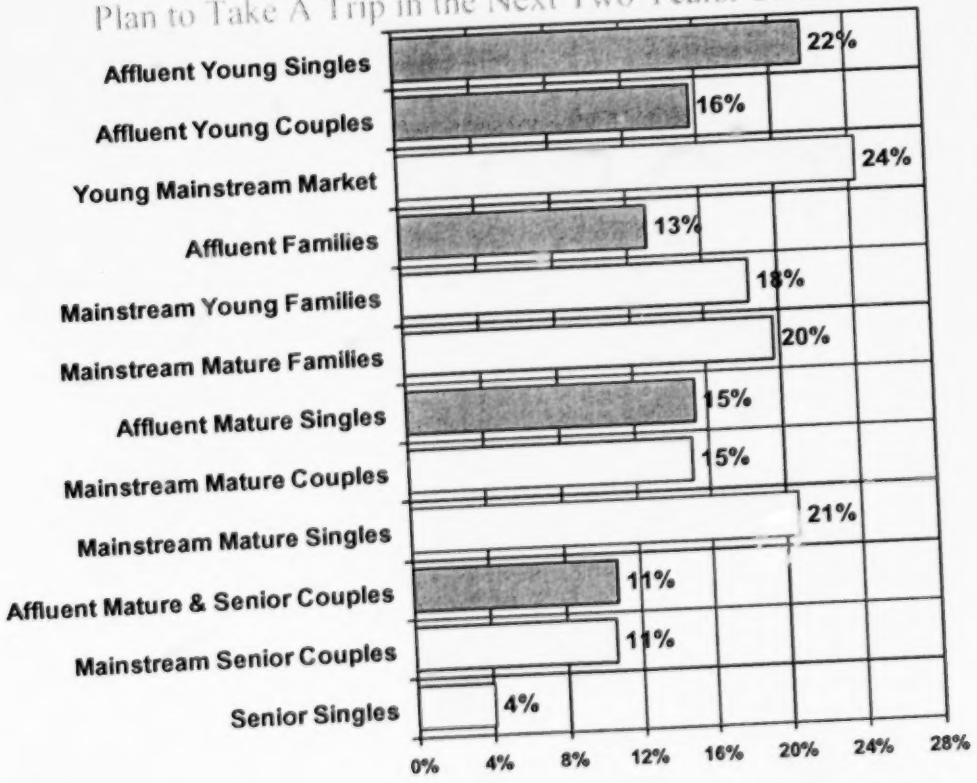
TAMS
Travel Activities & Motivation Survey

TAMS: Emergent Vacation Interests

Percent Net Change in Those Planning Stay in Accommodation Type in Next Two Years
Relative to Those Having Stayed in Accommodation Type in Past Two Years

Bed-and-Breakfast

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and
Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)

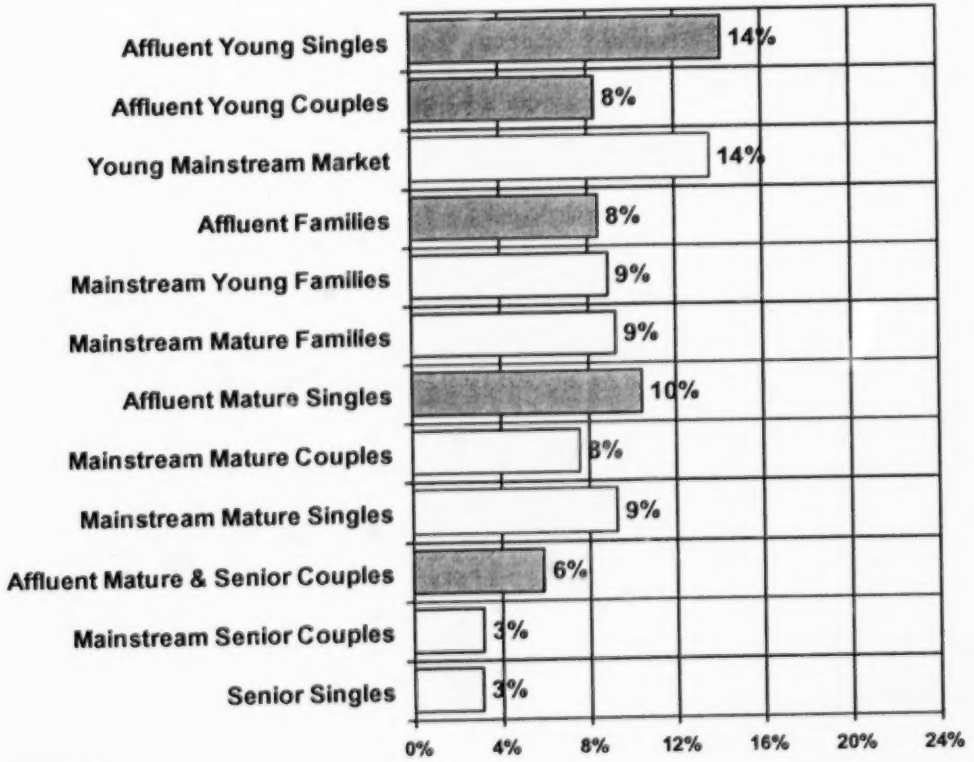


An emergent interest in bed-and-breakfasts was apparent across the marketplace. In fact, this type of accommodation was the most pronounced emergent interest in this category for 11 of the 12 segments. Affluent Young Singles, the Young Mainstream Market and Mainstream Mature Singles were especially likely to exhibit an emergent interest in bed-and-breakfasts.

Percent Net Change in Those Planning Stay in Accommodation Type in Next Two Years
Relative to Those Having Stayed in Accommodation Type in Past Two Years

Lakeside Resort in the Summer

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and
Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)

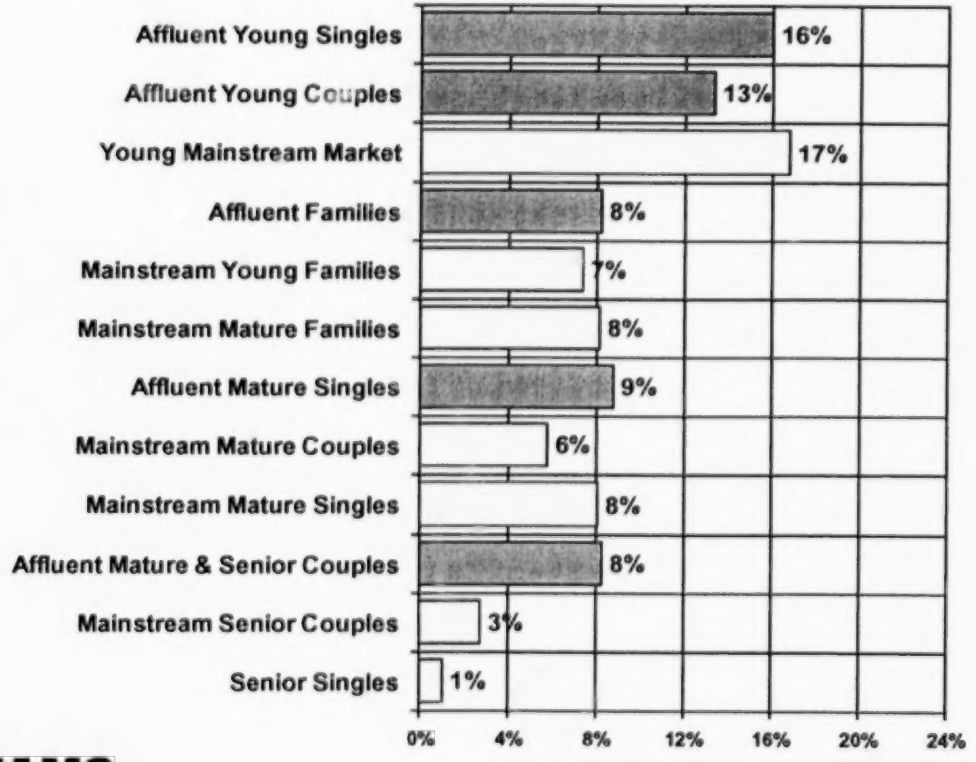


Staying at a lakeside resort during the summer was also an emergent interest for the majority of the 12 market segments. Affluent Young Singles and the Young Mainstream Market were especially likely to exhibit an emergent interest in lakeside resort stays during the summer travel season.

Percent Net Change in Those Planning Stay in Accommodation Type in Next Two Years
Relative to Those Having Stayed in Accommodation Type in Past Two Years

Health Spa

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and
Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)

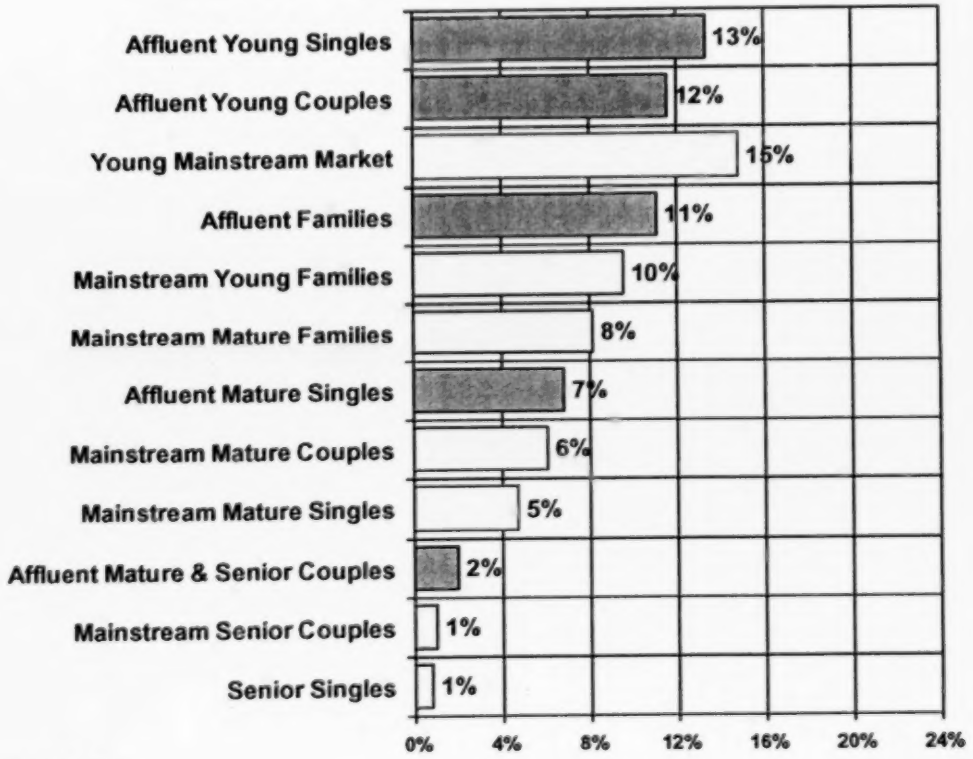


Staying at a health spa was an especially strong emergent interest within the three Youth segments (Affluent Young Singles, Affluent Young Couples, the Young Mainstream Market). However, an emergent interest in staying at a health spa also was evident in the Family and Mature segments of the market.

Percent Net Change in Those Planning Stay in Accommodation Type in Next Two Years
Relative to Those Having Stayed in Accommodation Type in Past Two Years

Ski or Mountain Resort in the Winter

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and
Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)



Staying at a ski or mountain resort during the winter was an especially strong emergent interest within the three Youth segments (Affluent Young Singles, Affluent Young Couples, the Young Mainstream Market). The extent to which such stays were an emergent interest tended to decline as the age of the traveller increased.

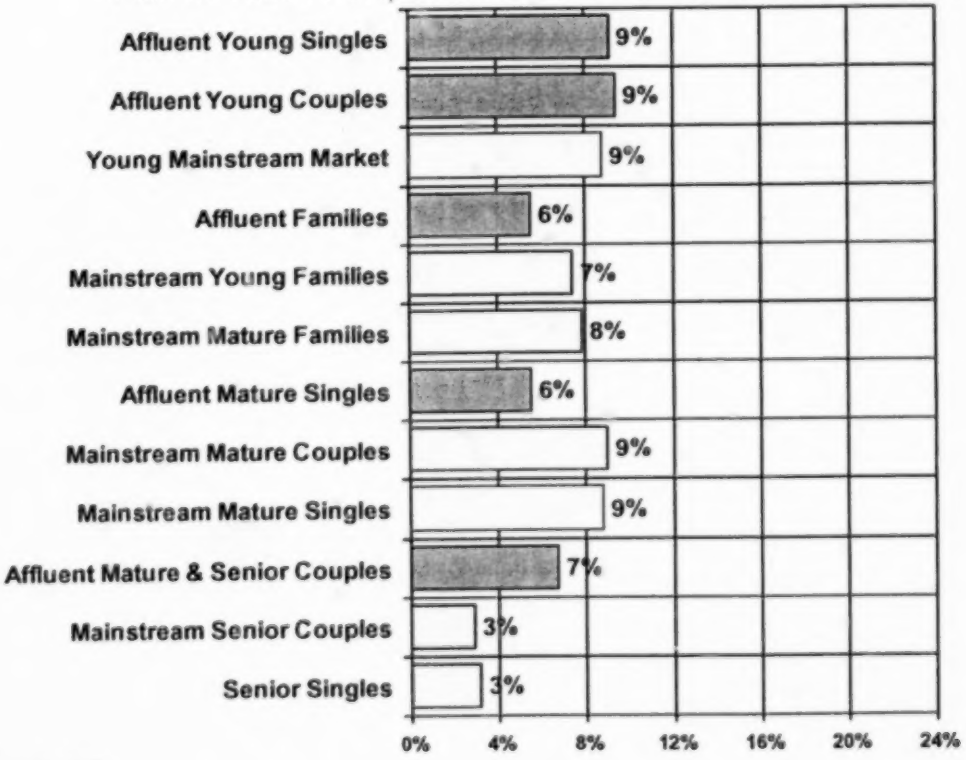
TAMS
Travel Activities & Motivation Survey

TAMS: Emergent Vacation Interests

Percent Net Change in Those Planning Stay in Accommodation Type in Next Two Years
Relative to Those Having Stayed in Accommodation Type in Past Two Years

Wilderness Lodge (Vehicle Accessible)

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and
Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)

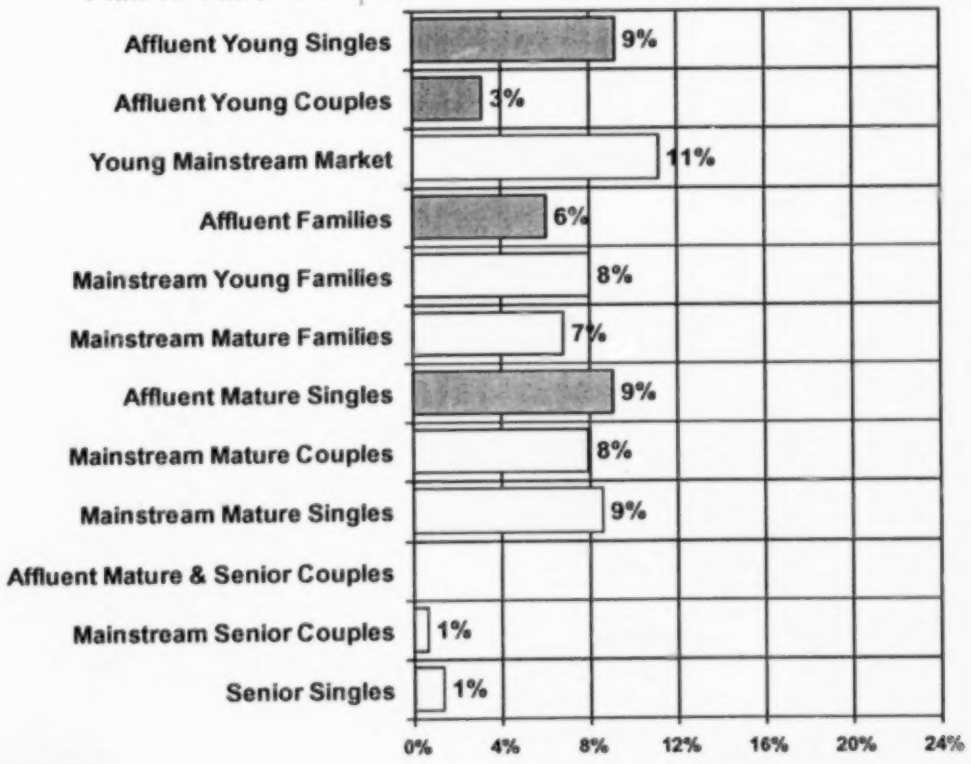


An emergent interest in staying in a wilderness lodge that can be reached by car was evident across the marketplace. There was little variation in the extent to which this was an emergent interest across the Youth, Family and Mature segments.

Percent Net Change in Those Planning Stay in Accommodation Type in Next Two Years
Relative to Those Having Stayed in Accommodation Type in Past Two Years

Seaside Resort in the Summer

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and
Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)

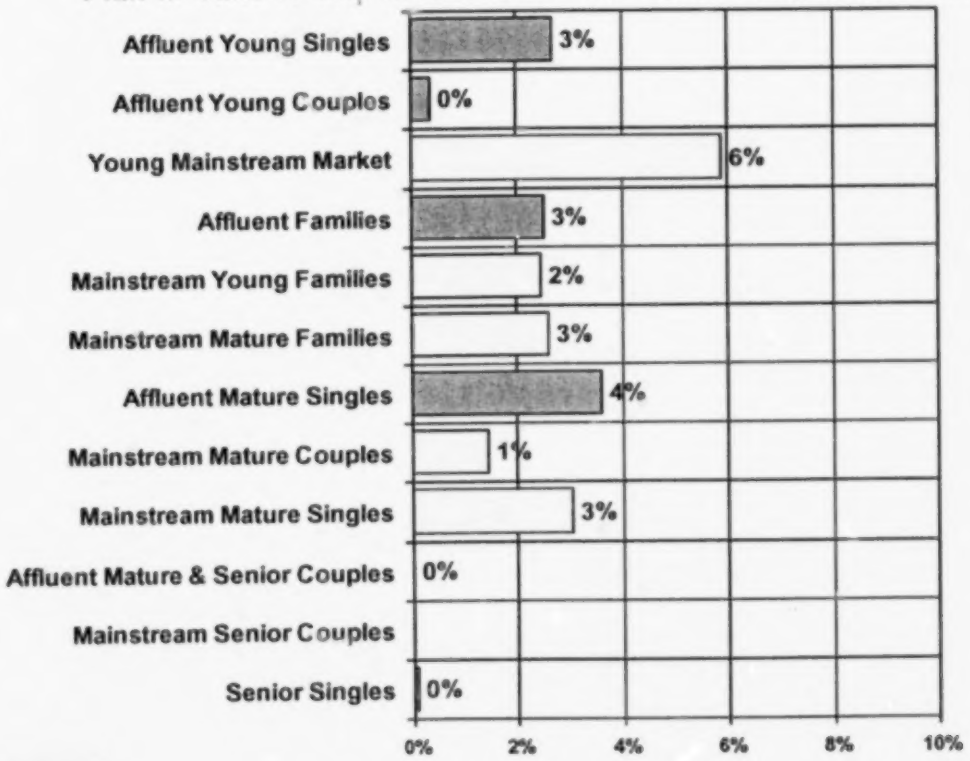


Staying at a seaside resort during the summer was an emergent interest across the Youth, Family and Mature segments. The Young Mainstream Market exhibited a particularly strong emergent interest in this type of activity-related accommodation.

Percent Net Change in Those Planning Stay in Accommodation Type in Next Two Years
Relative to Those Having Stayed in Accommodation Type in Past Two Years

Private Cottage or Condo You Rent

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and
Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)

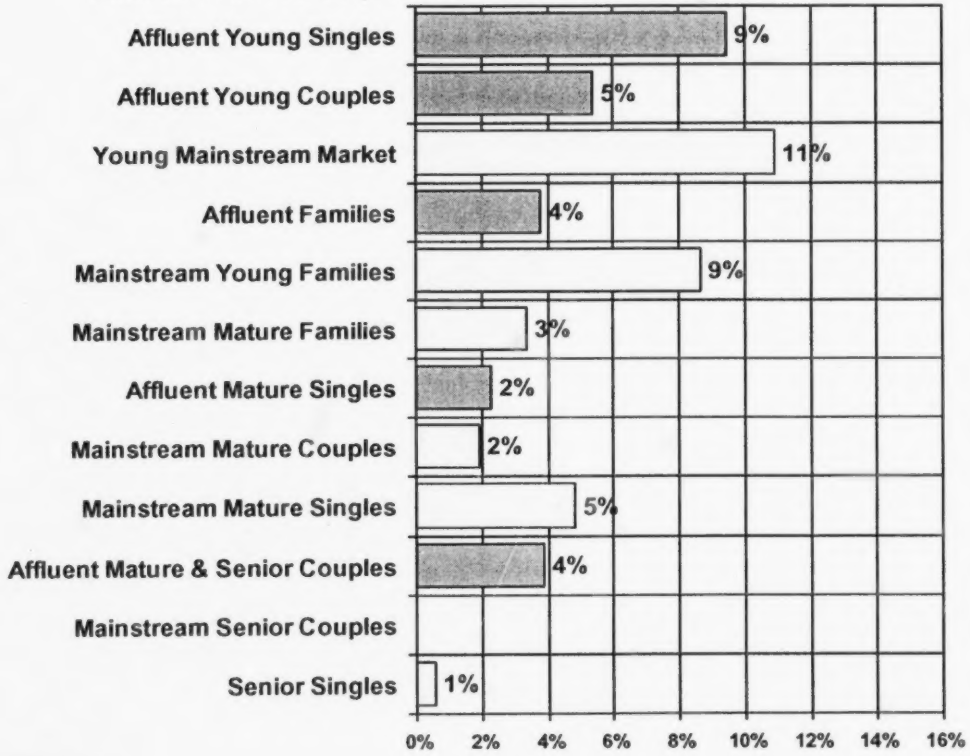


An emergent interest in staying in a private cottage or condo was most apparent within the Young Mainstream Market. The Family and Mature markets also exhibited a slight emergent interest in this type of accommodation.

Percent Net Change in Those Planning Stay in Accommodation Type in Next Two Years
Relative to Those Having Stayed in Accommodation Type in Past Two Years

Camping in Wilderness Setting

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and
Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)



An emergent interest in camping in a wilderness setting was most evident among the Affluent Young Singles, the Young Mainstream Market and Mainstream Young Families.

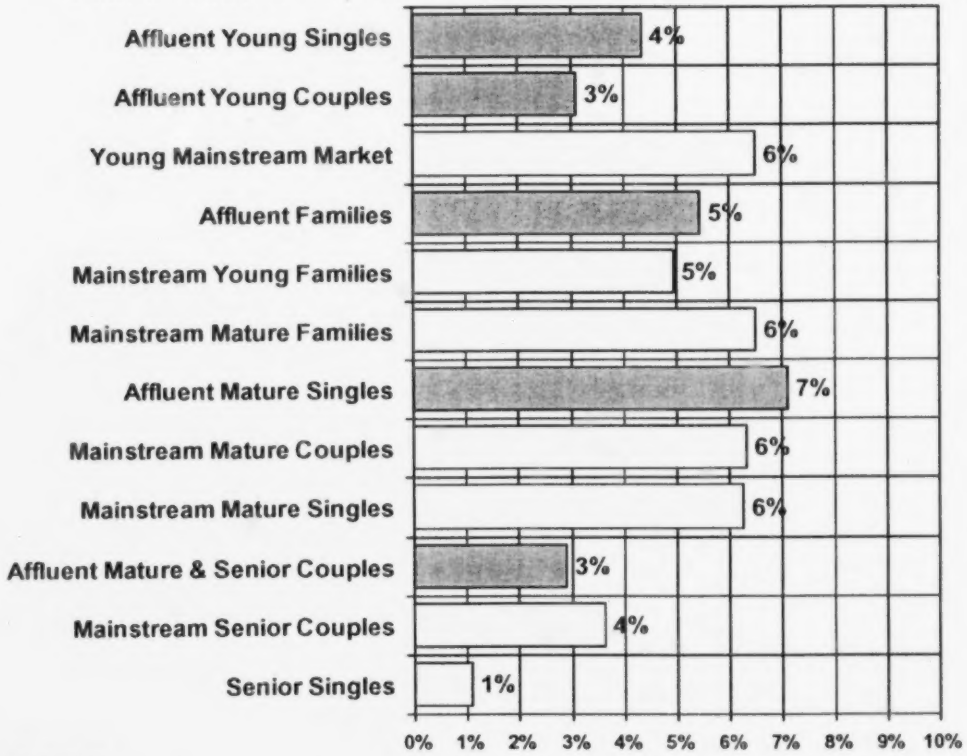
TAMS
Travel Activities & Motivation Survey

TAMS: Emergent Vacation Interests

Percent Net Change in Those Planning Stay in Accommodation Type in Next Two Years
Relative to Those Having Stayed in Accommodation Type in Past Two Years

Work Farm or Guest Ranch

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and
Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)

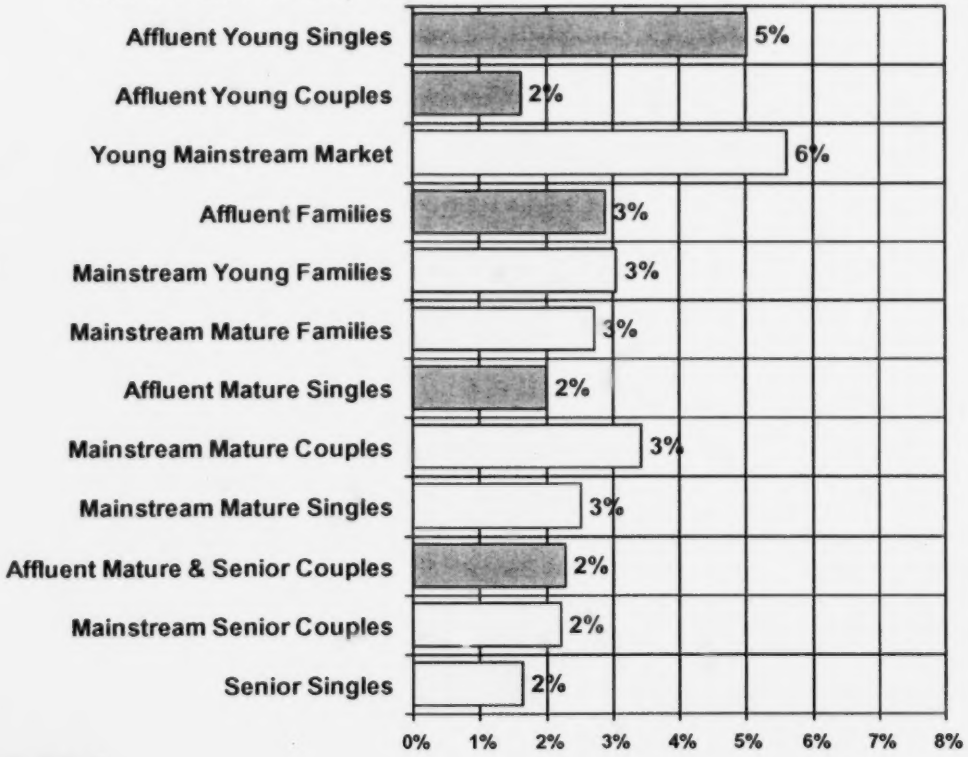


An emergent interest in staying at a work farm or guest ranch was most evident within the Family and Mature segments. The Young Mainstream Market also exhibited an emergent interest in this type of activity-related accommodation.

Percent Net Change in Those Planning Stay in Accommodation Type in Next Two Years
Relative to Those Having Stayed in Accommodation Type in Past Two Years

Remote Fly-In Outpost

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and
Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)



An emergent interest in staying in remote fly-in outposts was most apparent among Affluent Young Singles and the Young Mainstream Market. Apart from this, there was little variation in the extent of this emergent interest across the Family, Mature and Senior segments.

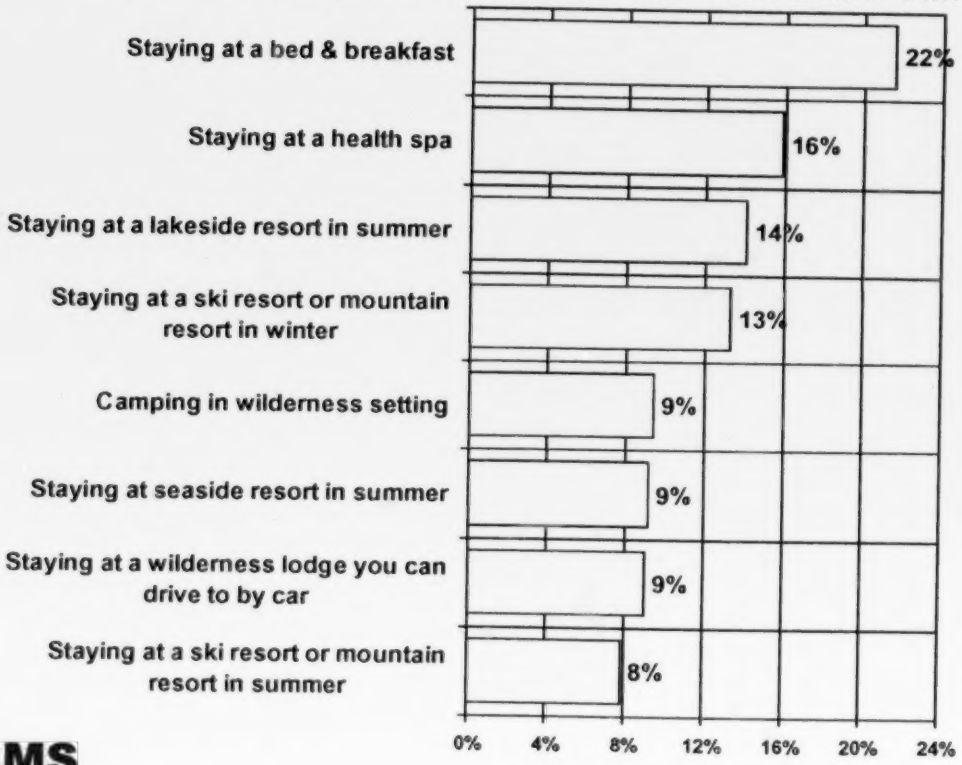
TAMS
Travel Activities & Motivation Survey

TAMS: Emergent Vacation Interests

Percent Net Change in Those Planning to Do Activity in Next Two Years
Minus Those Having Done Activity in Past Two Years

Top 8 Emergent Activity-Related Accommodations Interests — Young Affluent Singles

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)



Young Affluent Singles exhibited the strongest emergent interest in staying in a bed-and-breakfast. They also exhibited a strong emergent interest in stays in health spas, lakeside resorts in summer, and ski resorts during the winter travel season.

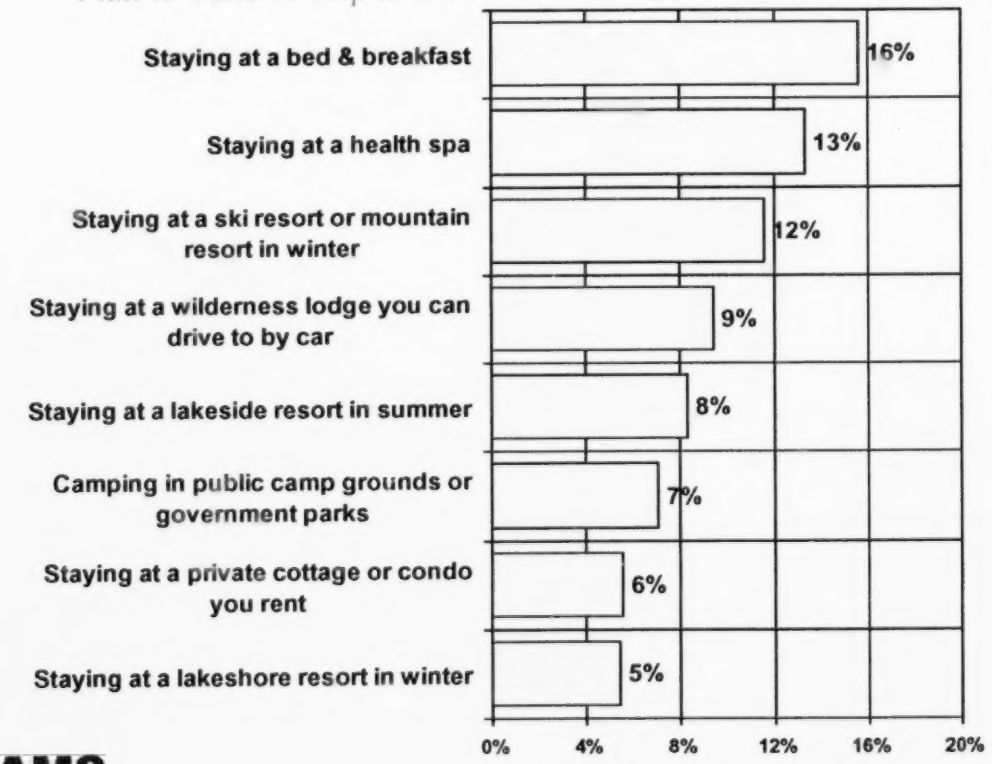
TAMS
Travel Activities & Motivation Survey

TAMS: Emergent Vacation Interests

Percent Net Change in Those Planning to Do Activity in Next Two Years
Minus Those Having Done Activity in Past Two Years

Top 8 Emergent Activity-Related Accommodations Interests — Young Affluent Couples

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)



Young Affluent Couples exhibited the strongest emergent interest for stays at bed-and-breakfasts, health spas, and ski or mountain resorts during the winter.

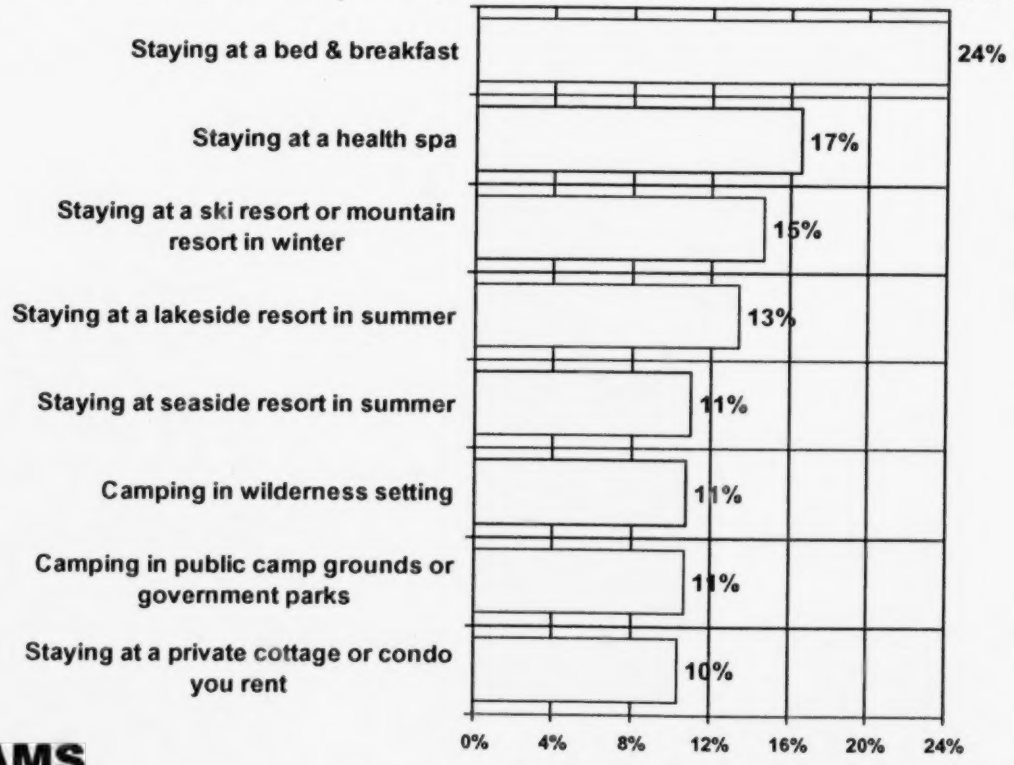
TAMS
Travel Activities & Motivation Survey

TAMS: Emergent Vacation Interests

Percent Net Change in Those Planning to Do Activity in Next Two Years
Minus Those Having Done Activity in Past Two Years

Top 8 Emergent Activity-Related Accommodations Interests — Young Mainstream Market

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)



The Young Mainstream Market exhibited the most pronounced emergent interest for stays at a bed-and-breakfast of any segment, suggesting this may be an excellent and unexpected target market for such accommodations. The Young Mainstream Market also exhibited an interest in health spas, ski or mountain resorts during the winter, and stays at a lakeside resorts during the summer.

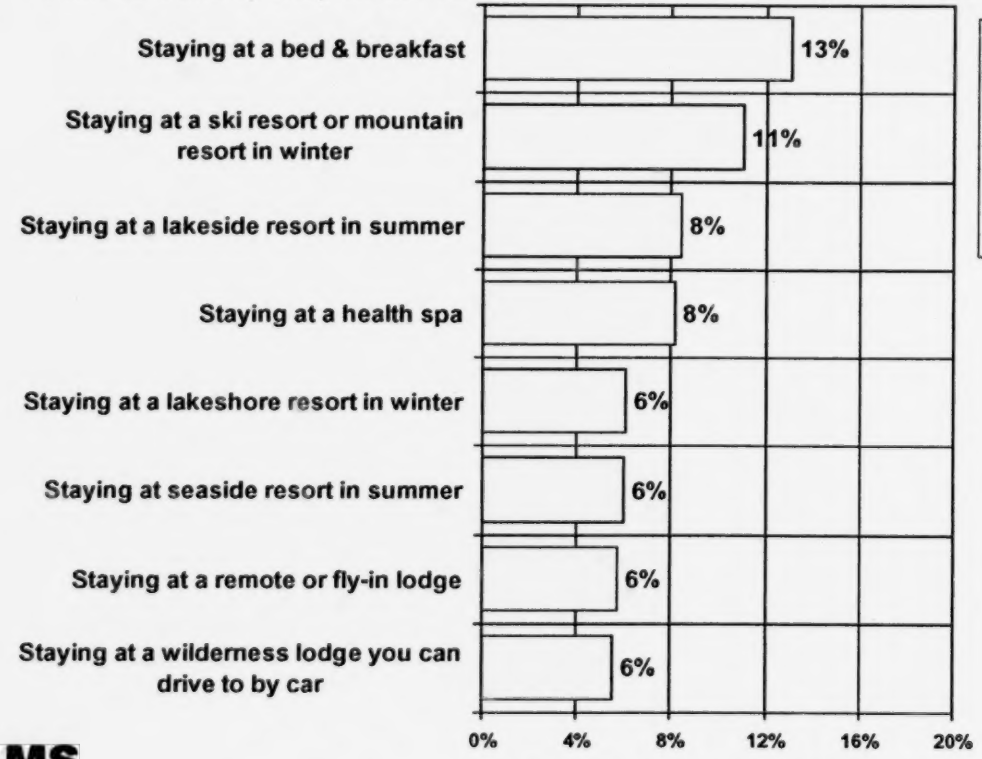
TAMS
Travel Activities & Motivation Survey

TAMS: Emergent Vacation Interests

Percent Net Change in Those Planning to Do Activity in Next Two Years
Minus Those Having Done Activity in Past Two Years

Top 8 Emergent Activity-Related Accommodations Interests — Affluent Families

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)



Affluent Families exhibited the strongest emergent interest for stays in bed-and-breakfasts, and stays at ski or mountain resorts during the winter. They also exhibited moderate emergent interest for stays in lakeside resorts during the summer, and at health spas.

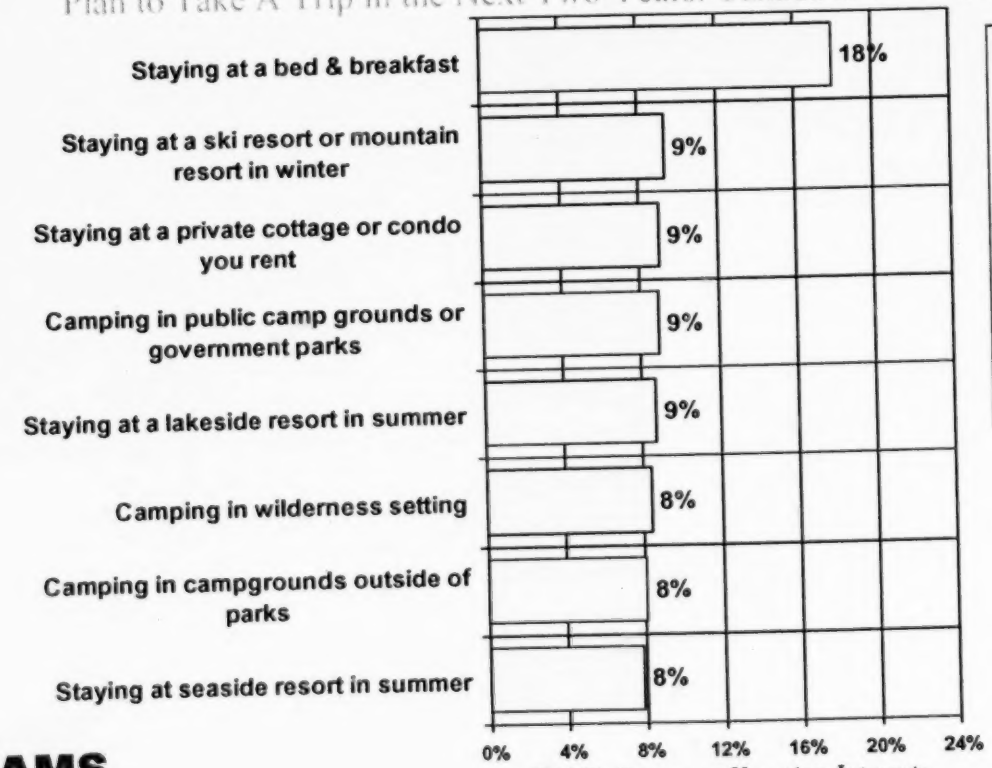
TAMS
Travel Activities & Motivation Survey

TAMS: Emergent Vacation Interests

Percent Net Change in Those Planning to Do Activity in Next Two Years
Minus Those Having Done Activity in Past Two Years

Top 8 Emergent Activity-Related Accommodations Interests — Mainstream Young Families

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)



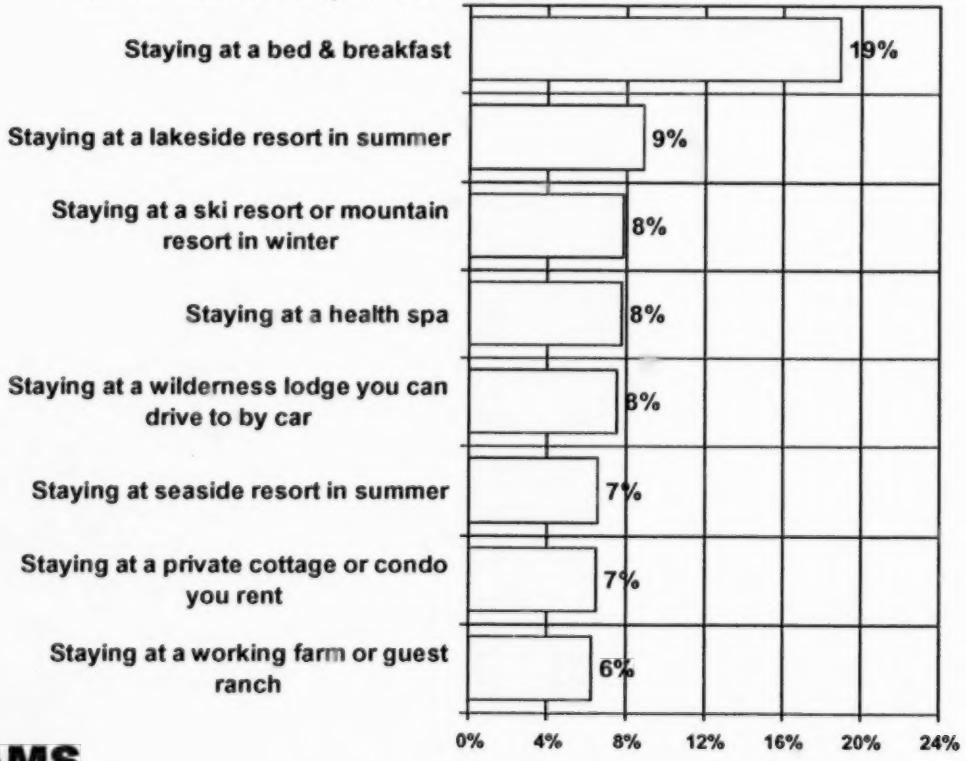
TAMS: Emergent Vacation Interests

Mainstream Young Families exhibited a very strong emergent interest in stays in a bed-and-breakfast. They also exhibited emergent interest in a wide range of other activity-related accommodations, including stays in ski or mountain resorts during the winter, private condos or cottages, summer stays at a lakeside or seaside resort, and camping. Mainstream Young Families, who usually travel with young children, tend to exhibit emergent interests in accommodations that are suitable for children.

Percent Net Change in Those Planning to Do Activity in Next Two Years
Minus Those Having Done Activity in Past Two Years

Top 8 Emergent Activity-Related Accommodations Interests — Mainstream Mature Families

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)



Mainstream Mature Families also exhibited a very strong emergent interest in stays in a bed-and-breakfast. They also exhibited emergent interests in summer stays at lakeside or seaside resorts, winter stays at ski or mountain resorts, health spas, private cottages and condos, and working farms or guest ranches.

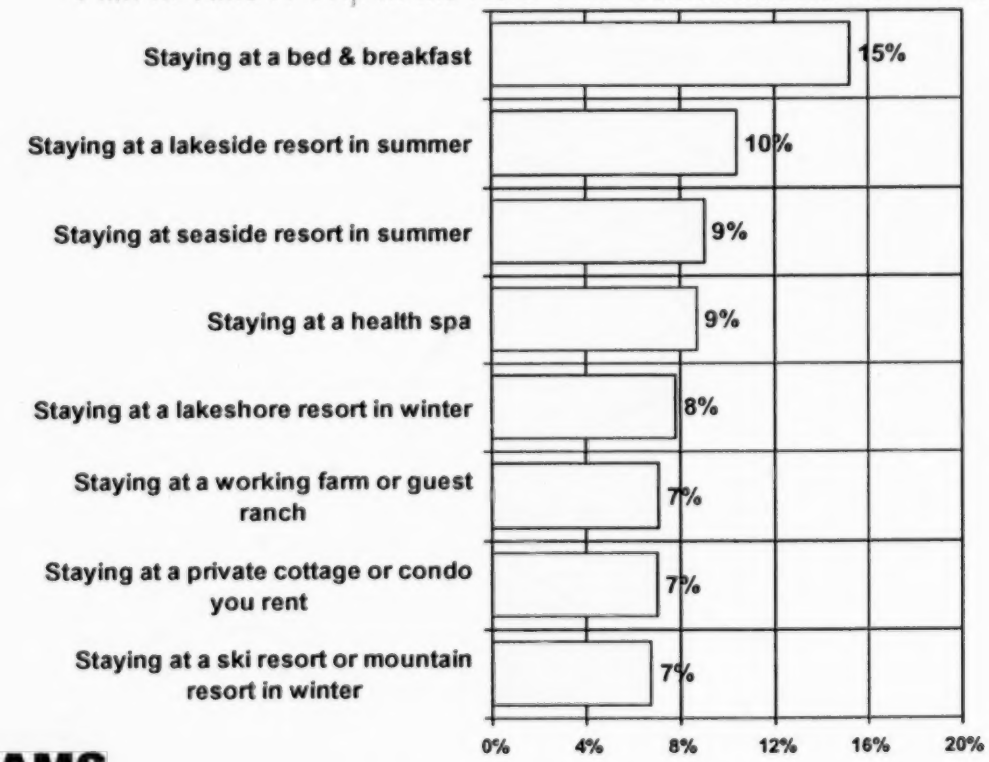
TAMS
Travel Activities & Motivation Survey

TAMS: Emergent Vacation Interests

Percent Net Change in Those Planning to Do Activity in Next Two Years
Minus Those Having Done Activity in Past Two Years

Top 8 Emergent Activity-Related Accommodations Interests — Affluent Mature Singles

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)

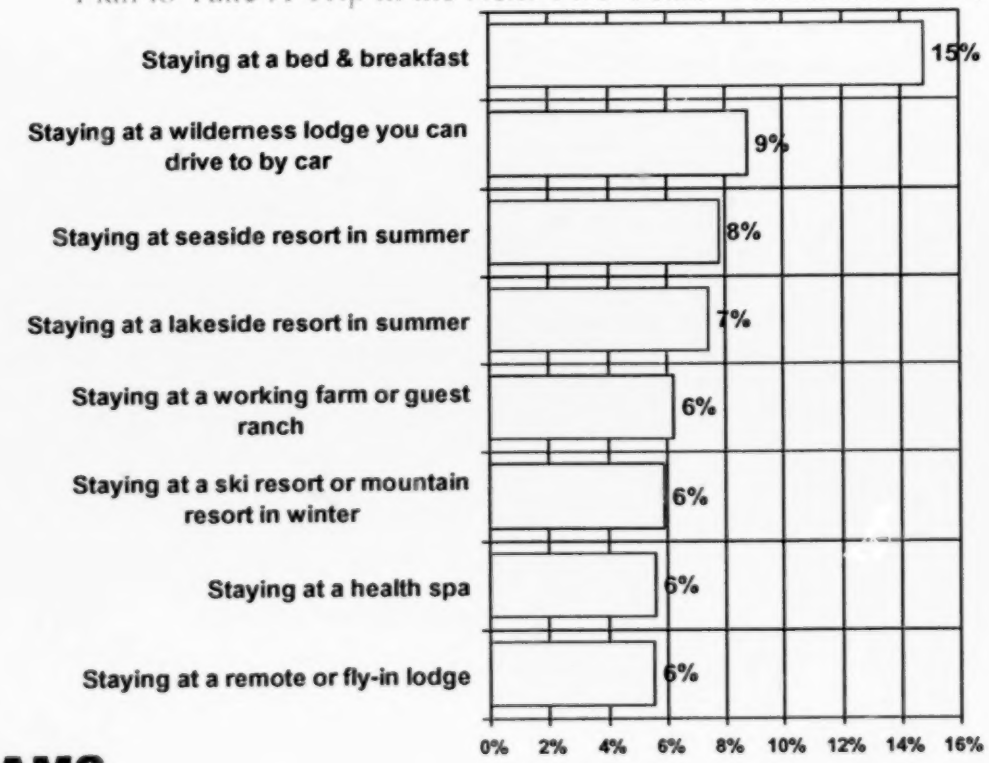


As with other segments, Affluent Mature Singles exhibited the most pronounced emergent interest in stays in a bed-and-breakfast. They also exhibited emergent interest in summer stays at lakeside or seaside resorts, and health spas.

Percent Net Change in Those Planning to Do Activity in Next Two Years
Minus Those Having Done Activity in Past Two Years

Top 8 Emergent Activity-Related Accommodations Interests — Mainstream Mature Couples

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)



Mainstream Mature Couples exhibited the strongest emergent interest in stays in bed-and-breakfasts. Other emergent interests within this segment include stays at vehicle-accessible wilderness lodges, and stays at lakeside or seaside resorts during the summer. Stays at a working farm or guest ranch, a health spa and a remote fly-in lodge also were emergent interests within this segment.

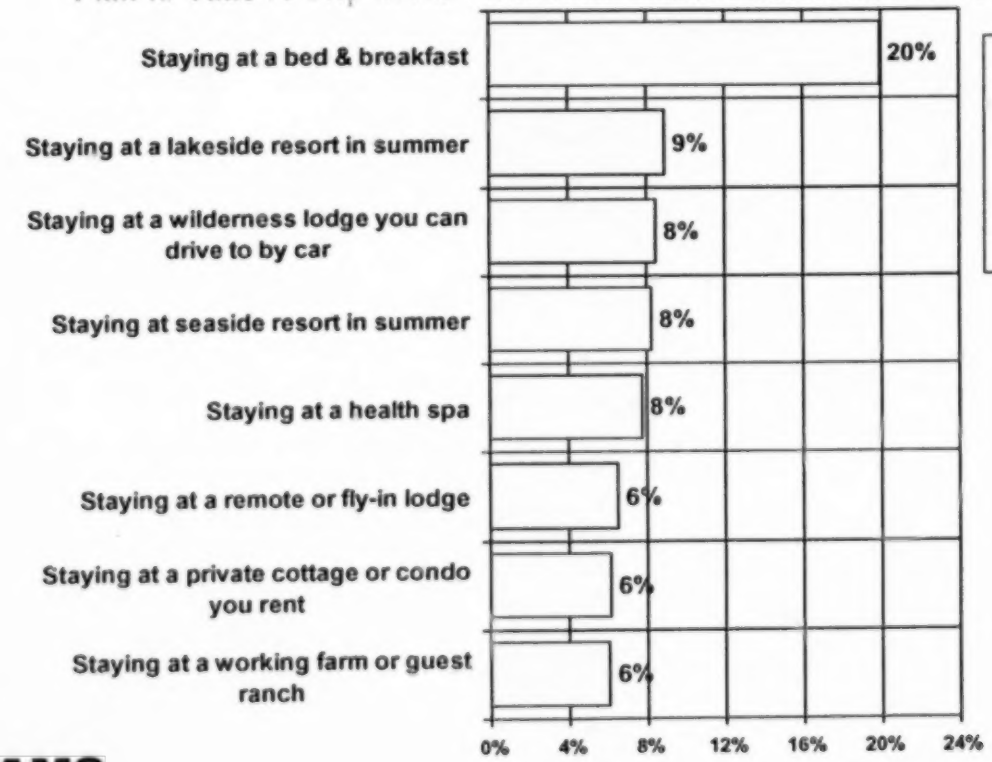
TAMS
Travel Activities & Motivation Survey

TAMS: Emergent Vacation Interests

Percent Net Change in Those Planning to Do Activity in Next Two Years
Minus Those Having Done Activity in Past Two Years

Top 8 Emergent Activity-Related Accommodations Interests — Mainstream Mature Singles

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)



Mainstream Mature Singles exhibited a very strong emergent interest in bed-and-breakfasts. They also exhibited emergent interests in summer stays at lakeside or seaside resorts, wilderness lodges and remote fly-in outposts, health spas, private cottages and condos, and working farms or guest ranches.

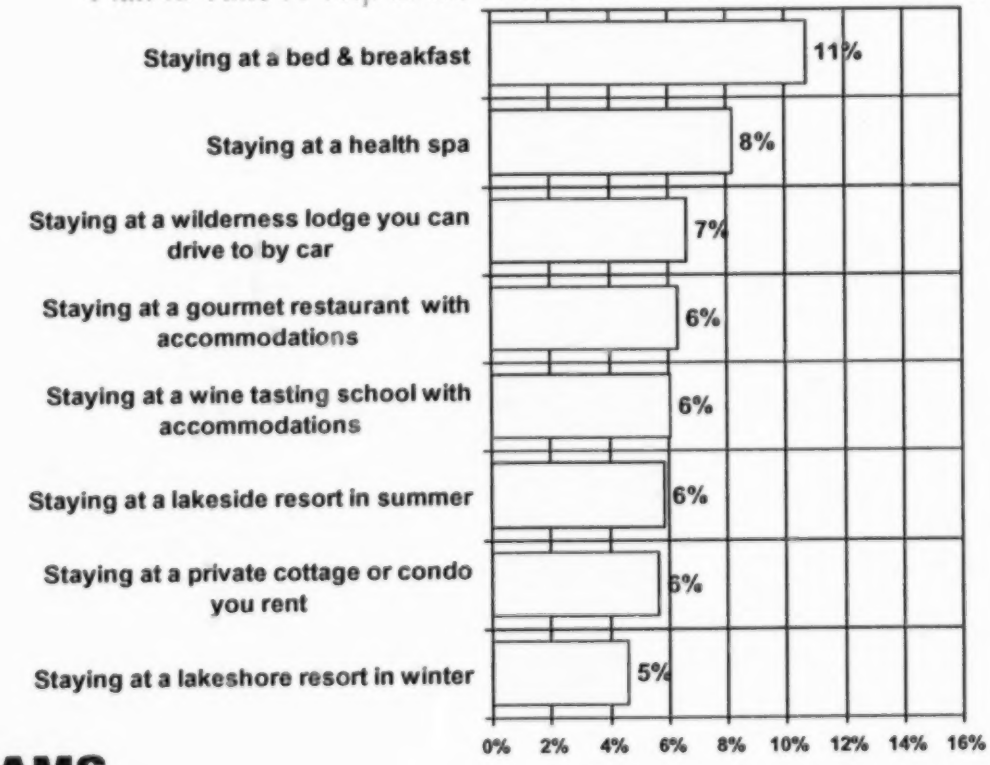
TAMS
Travel Activities & Motivation Survey

TAMS: Emergent Vacation Interests

Percent Net Change in Those Planning to Do Activity in Next Two Years
Minus Those Having Done Activity in Past Two Years

Top 8 Emergent Activity-Related Accommodations Interests — Affluent Mature and Senior Couples

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)



Affluent Mature and Senior Couples were most likely to exhibit an emergent interest in bed-and-breakfasts and health spas. However, this well-travelled segment was among the most likely to exhibit an emergent interest in more exotic accommodation types such as gourmet restaurants or wine tasting schools with accommodations, and lakeshore resorts in the winter.

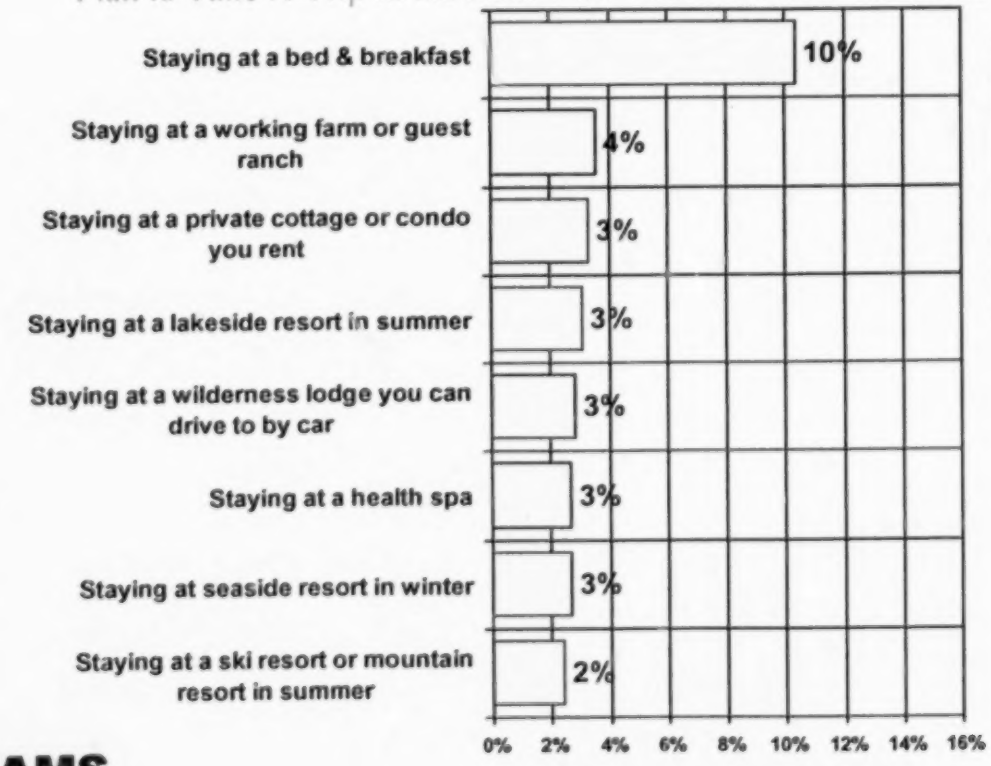
TAMS
Travel Activities & Motivation Survey

TAMS: Emergent Vacation Interests

Percent Net Change in Those Planning to Do Activity in Next Two Years
Minus Those Having Done Activity in Past Two Years

Top 8 Emergent Activity-Related Accommodations Interests — Mainstream Senior Couples

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and
Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)



Mainstream Senior Couples exhibited a relatively strong emergent interest in staying in a bed-and-breakfast. Other emergent activity-related accommodations interests were relatively weak compared to other segments, suggesting that this segment is less likely to have aspirations to stay in novel types of accommodations.

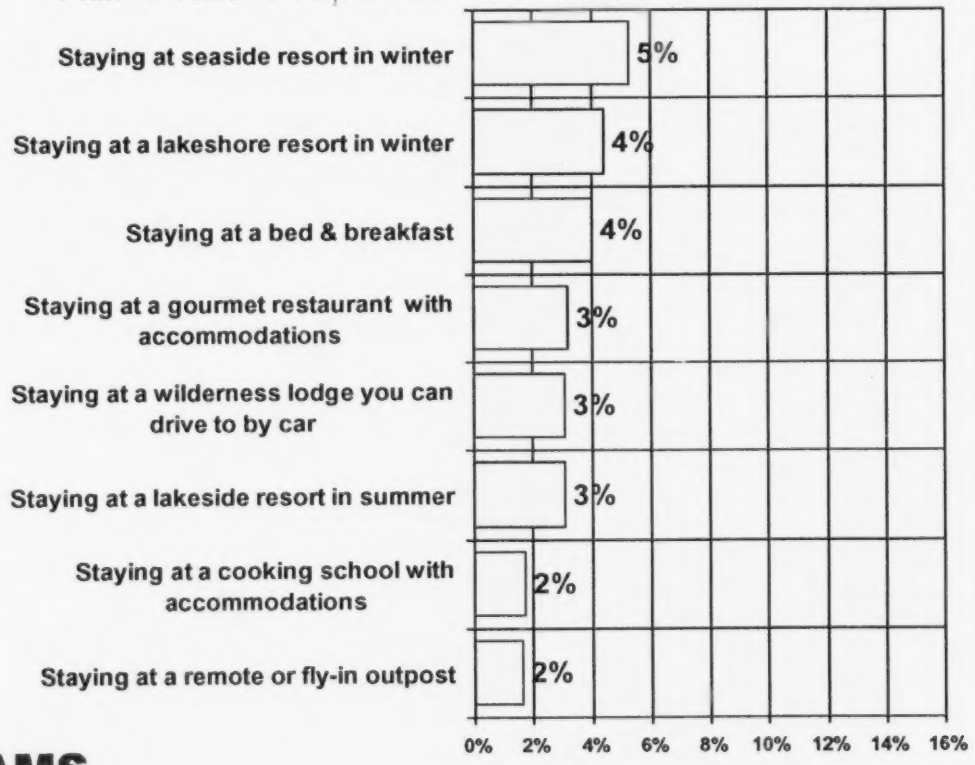
TAMS
Travel Activities & Motivation Survey

TAMS: Emergent Vacation Interests

Percent Net Change in Those Planning to Do Activity in Next Two Years
Minus Those Having Done Activity in Past Two Years

Top 8 Emergent Activity-Related Accommodations Interests — Senior Singles

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and
Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)



Senior Singles exhibited few emergent interests relative to the other segments in the activity-based accommodations. The most pronounced emergent interest in this segment was for stays at seaside resorts during the winter.

TAMS
Travel Activities & Motivation Survey

TAMS: Emergent Vacation Interests

Section Six

Emergent Touring Vacation Interests

Touring and Cruising Sought and Will Seek

- Research Method -

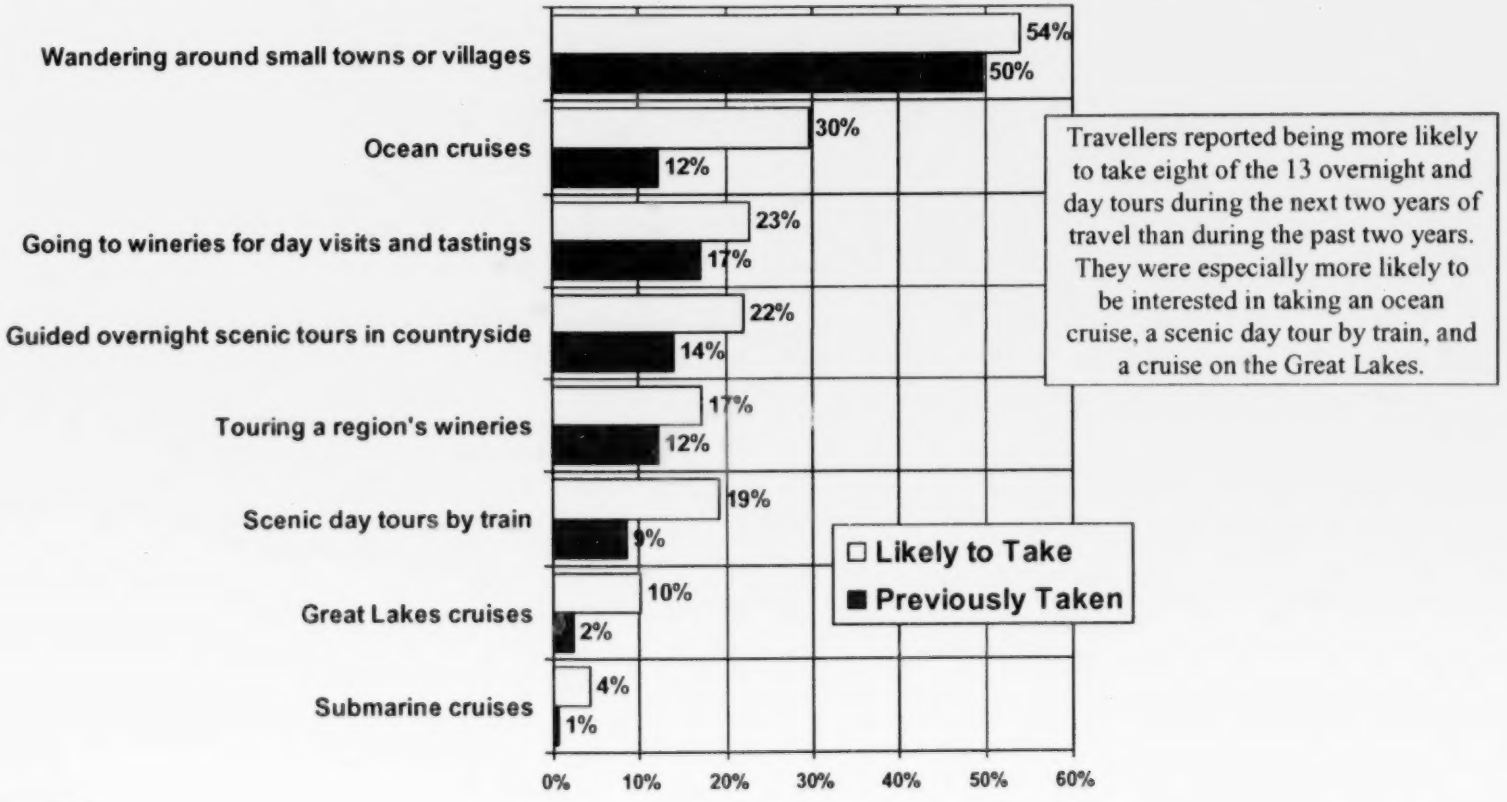
In the mailback survey, those who had taken a trip during the past two years were asked which of 13 types of overnight tours and day tours they had taken during the past two years while travelling.

They also were asked which of these same overnight and day tours they were likely to take over the course of the next two years while travelling.

The difference in the percent who had taken each type of overnight and day tour during the past two years and the percent who planned to take each overnight and day tour during the next two years of travel was employed as a gauge of the extent to which each type of touring activity was an emergent interest.

Overnight/Day Tours/Cruises More Likely In Next Two Years Relative To The Past Two Years

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)

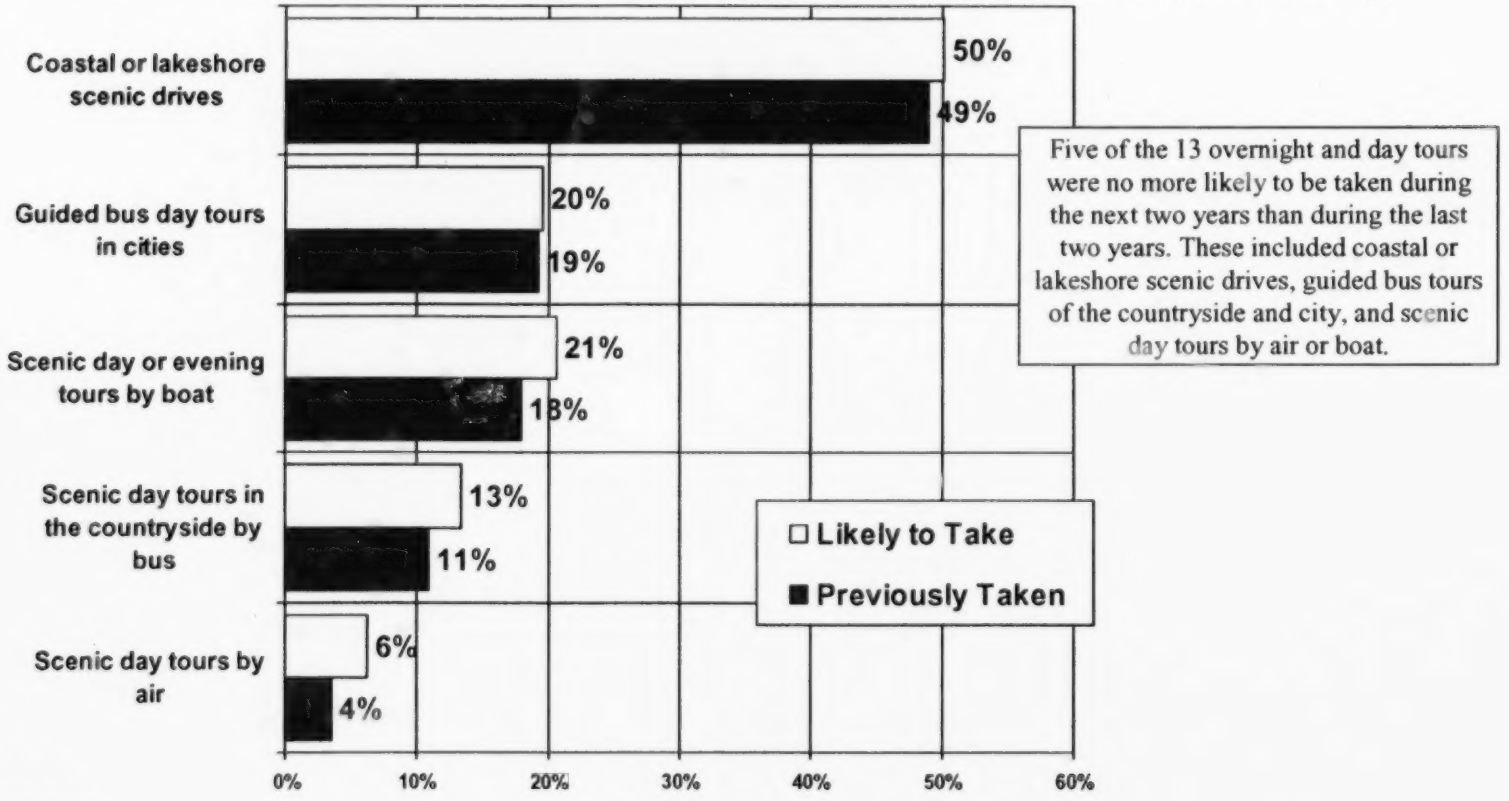


TAMS
Travel Activities & Motivation Survey

TAMS: Emergent Vacation Interests

Overnight/Day Tours/Cruises As Likely In Next Two Years As During the Past Two Years

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)

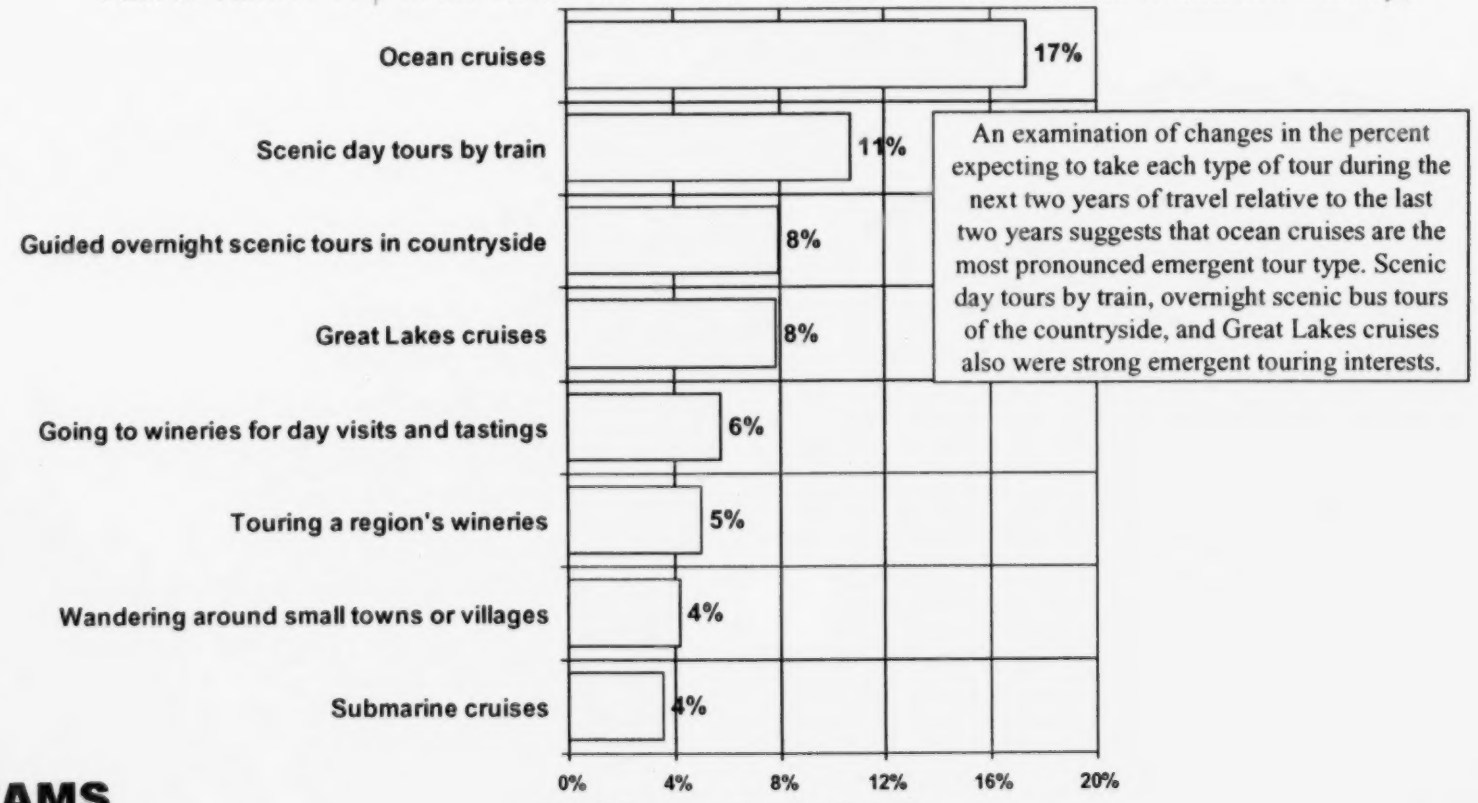

Coastal or lakeshore scenic drives
50%
49%
Guided bus day tours in cities
20%
19%
Scenic day or evening tours by boat
21%
18%
Scenic day tours in the countryside by bus
13%
11%
Scenic day tours by air
6%
4%
0%
10%
20%
30%
40%
50%
60%
Likely to Take
Previously Taken
Five of the 13 overnight and day tours were no more likely to be taken during the next two years than during the last two years. These included coastal or lakeshore scenic drives, guided bus tours of the countryside and city, and scenic day tours by air or boat.

TAMS
Travel Activities & Motivation Survey

Overnight and Day Tours More Likely To Be Taken In Next Two Years Relative to Past Two Years

Change in Percent Likely to Take Tour: Next Two Years Versus Past Two Years

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)

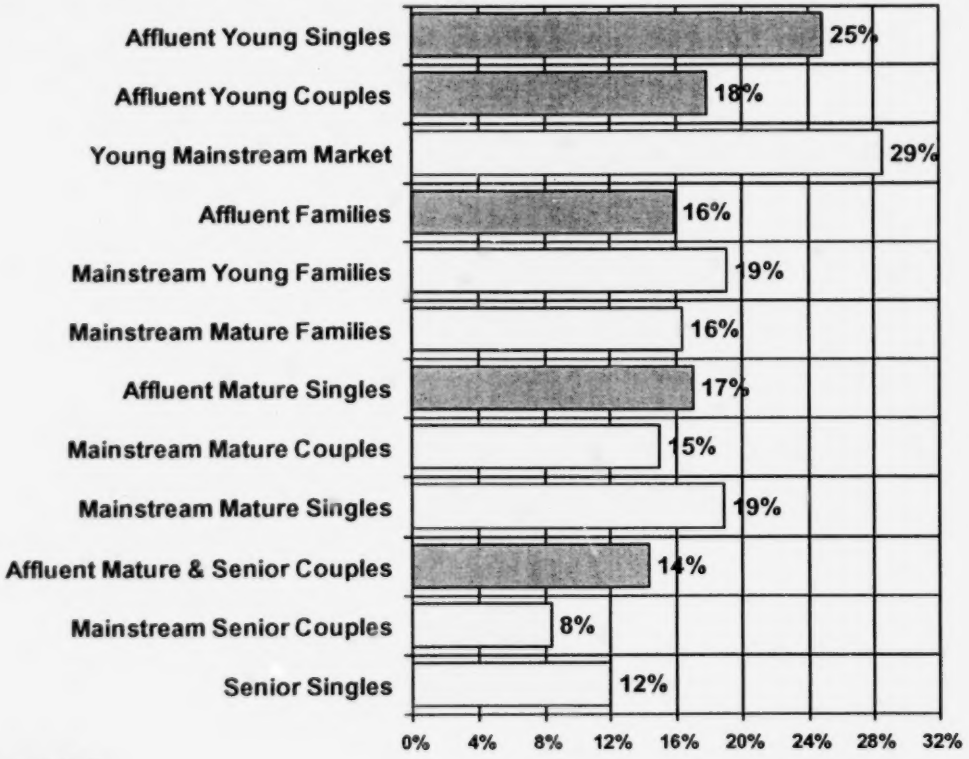


An examination of changes in the percent expecting to take each type of tour during the next two years of travel relative to the last two years suggests that ocean cruises are the most pronounced emergent tour type. Scenic day tours by train, overnight scenic bus tours of the countryside, and Great Lakes cruises also were strong emergent touring interests.

Percent Net Change In Those Planning Take Tour/Cruise in Next Two Years Relative to Those Having Taken Tour/Cruise in Past Two Years

Ocean Cruises

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)



An emergent interest in ocean cruises was apparent across all 12 segments in the market. Ocean cruises were especially an emergent interest among Affluent Young Singles and the Young Mainstream Market.

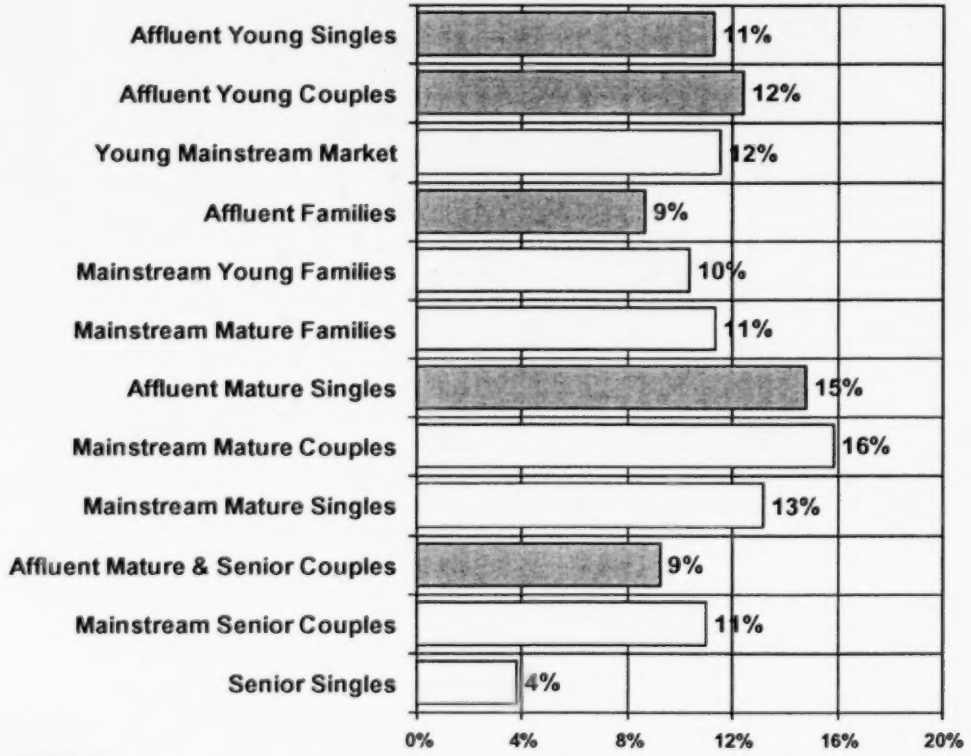
TAMS
Travel Activities & Motivation Survey

TAMS: Emergent Vacation Interests

Percent Net Change in Those Planning Take Tour/Cruise in Next Two Years Relative to Those Having Taken Tour/Cruise in Past Two Years

Scenic Day Tours By Train

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)

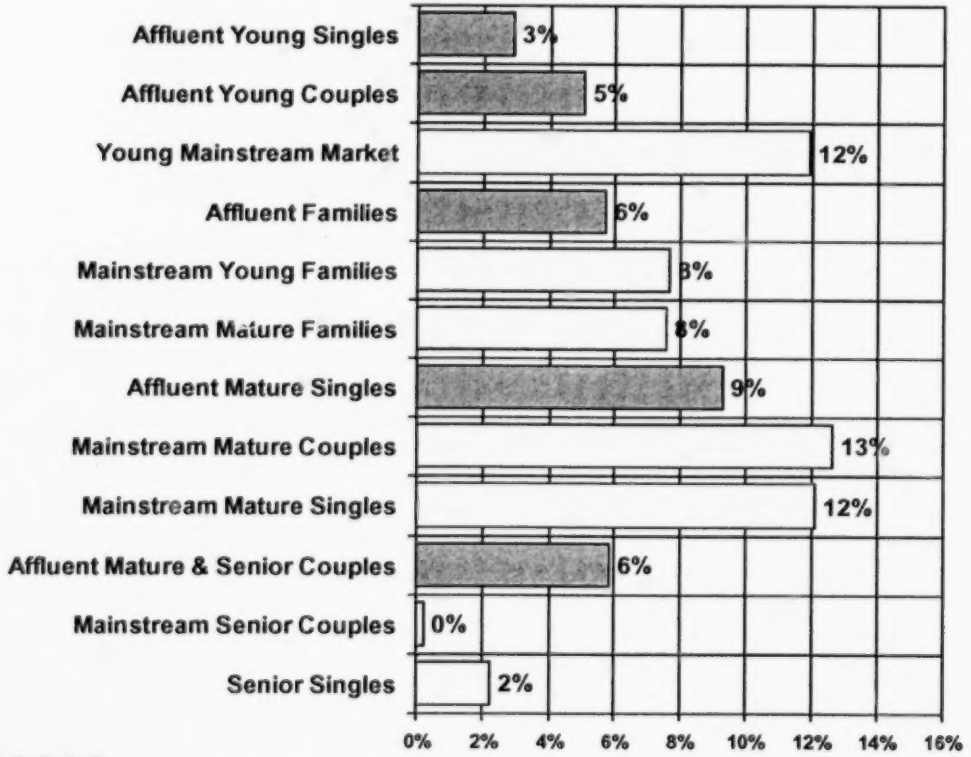


An emergent interest in scenic day tours by train was apparent across the market. Scenic day tours by train were especially appealing to Affluent Mature Singles, Mainstream Mature Couples and Mainstream Mature Singles.

Percent Net Change in Those Planning Take Tour/Cruise in Next Two Years Relative to Those Having Taken Tour/Cruise in Past Two Years

Overnight Scenic Tours of Countryside

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)



Overnight scenic tours of the countryside were most likely to be an emergent touring interest among Mainstream Mature Couples and Mainstream Mature Singles. However, this type of touring was also clearly an emergent touring interest within the Young Mainstream Market.

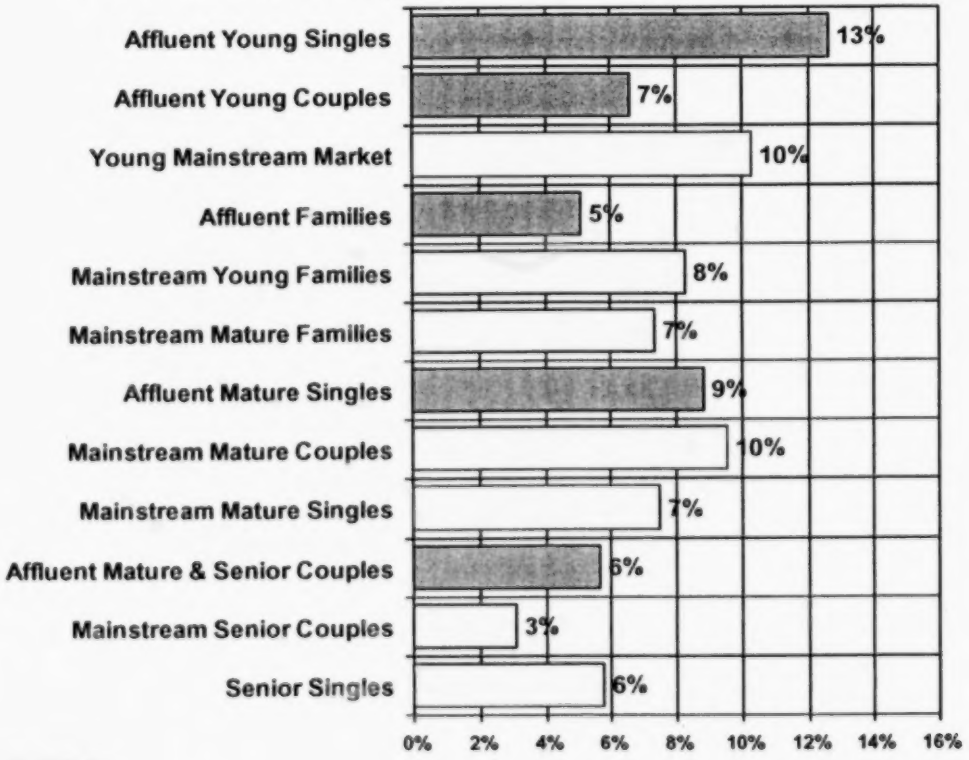
TAMS
Travel Activities & Motivation Survey

TAMS: Emergent Vacation Interests

Percent Net Change in Those Planning Take Tour/Cruise in Next Two Years Relative to Those Having Taken Tour/Cruise in Past Two Years

Overnight Great Lakes Cruises

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)



An emergent interest in Great Lakes cruises was evident across all 12 segments of the market. The Affluent Young Singles, the Young Mainstream Market, Affluent Mature Singles and Mainstream Mature Couples were especially likely to exhibit an emergent interest in an overnight Great Lakes cruise.

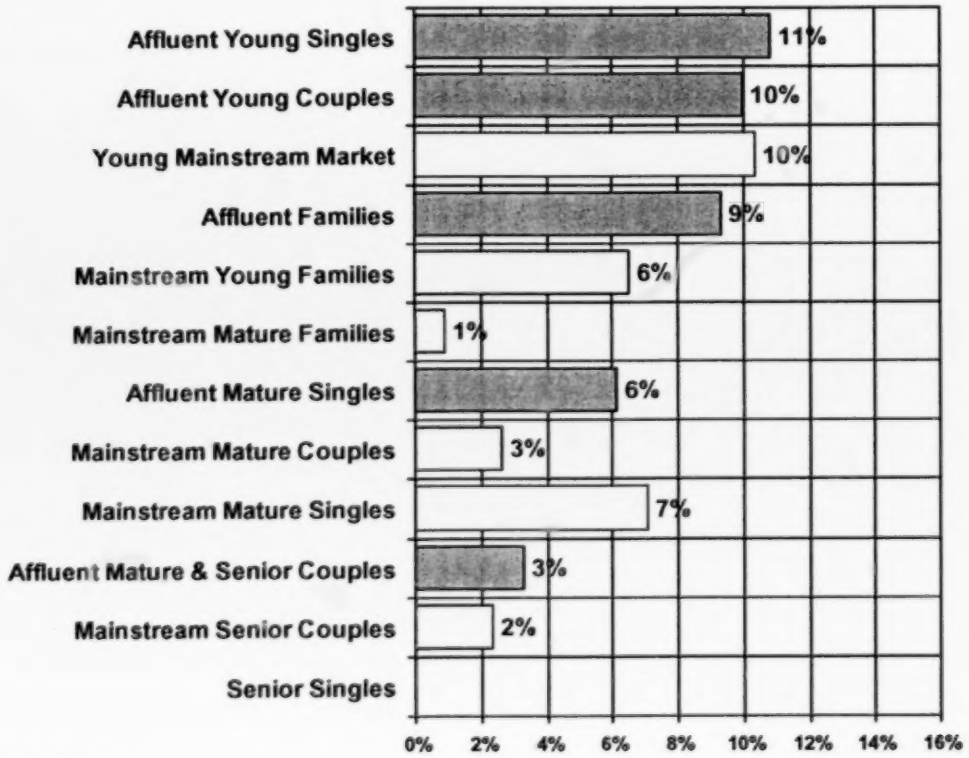
TAMS
Travel Activities & Motivation Survey

TAMS: Emergent Vacation Interests

Percent Net Change in Those Planning Take Tour/Cruise in Next Two Years Relative to Those Having Taken Tour/Cruise in Past Two Years

Day Visits to Wineries for Tastings

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)



An emergent interest in day visits to wineries for tastings was especially evident within the three Youth segments, as well as the Affluent Family segment. Mainstream Young Families, Affluent Mature Singles and Mainstream Mature Singles also exhibited an emergent interest in this type of touring activity.

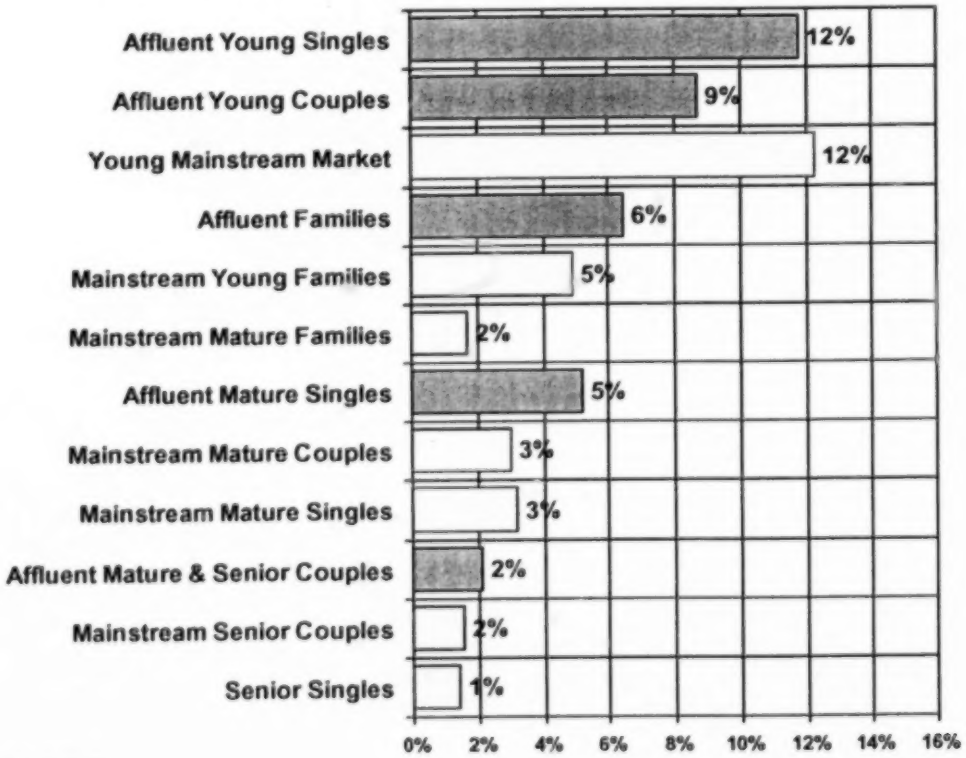
TAMS
Travel Activities & Motivation Survey

TAMS: Emergent Vacation Interests

Percent Net Change in Those Planning Take Tour/Cruise in Next Two Years Relative to Those Having Taken Tour/Cruise in Past Two Years

Overnight Tours of Wine Regions

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)



An emergent interest in overnight tours of wine regions was also especially evident within the three Youth segments (i.e., Affluent Young Singles, Affluent Young Couples, Young Mainstream Market). Affluent Families, Mainstream Young Families and Affluent Mature Singles also exhibited an emergent interest in overnight tours of wine regions.

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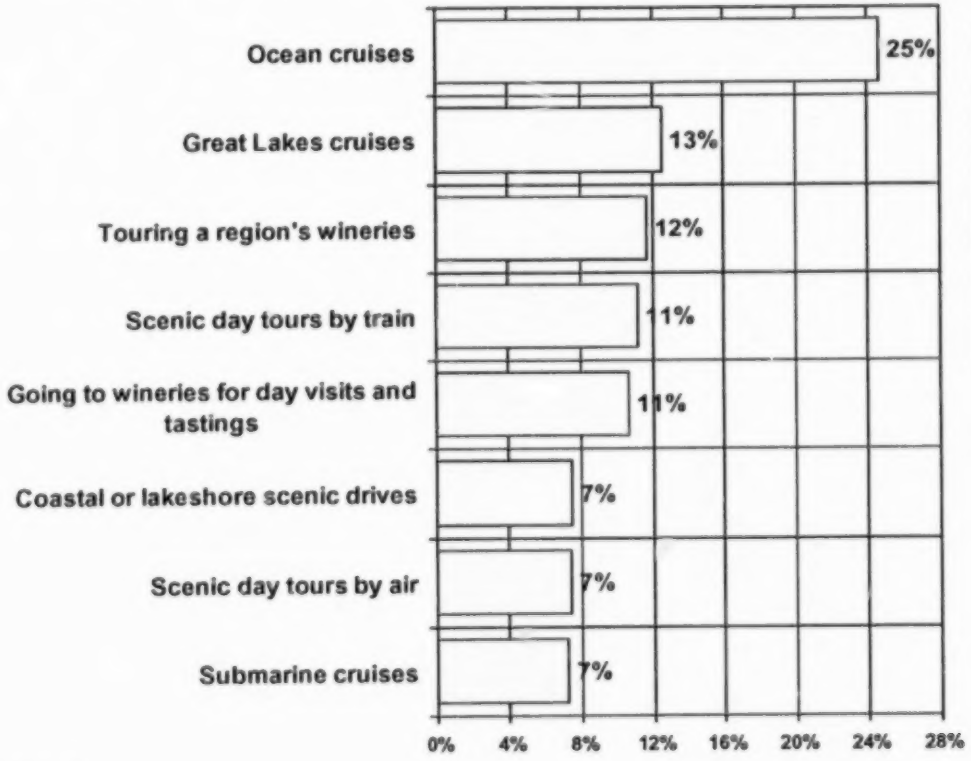
Travel Activities & Motivation Survey

TAMS: Emergent Vacation Interests

Percent Net Change in Those Planning to Do Activity in Next Two Years
Minus Those Having Done Activity in Past Two Years

Top Emergent Touring/Cruising Interests – Young Affluent Singles

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and
Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)

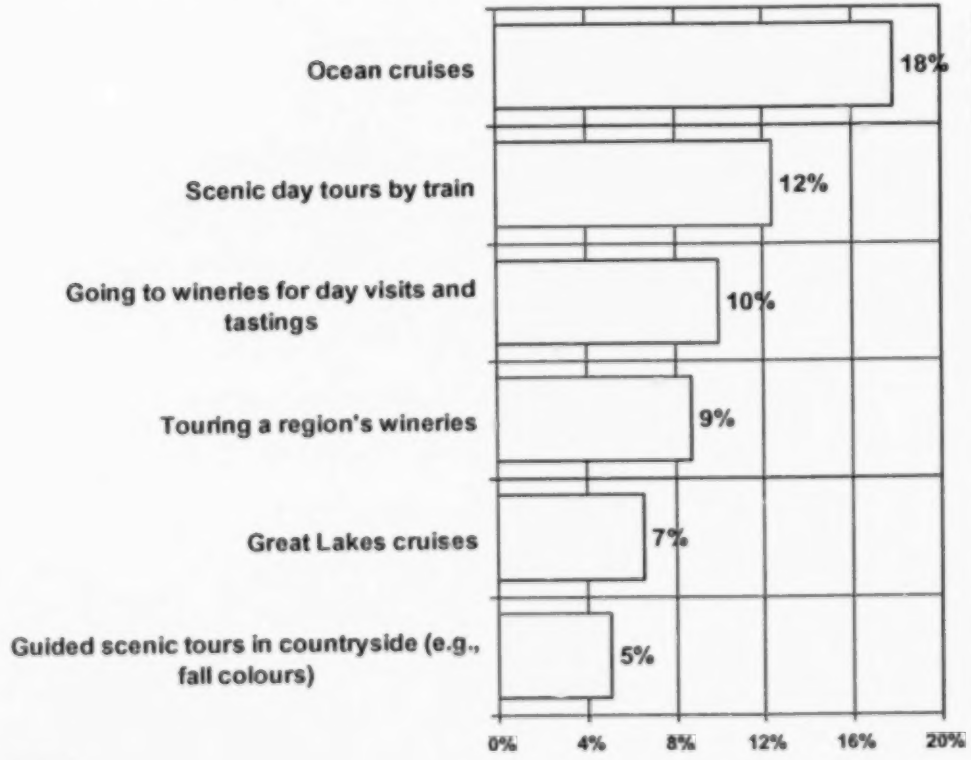


The Young Affluent Singles exhibited a very strong emergent touring interest in ocean cruises. They also exhibited a strong emergent interest in Great Lakes cruises, overnight and day tours to wineries, and scenic day tours by train. Affluent Young Singles were also one of two segments to exhibit a relatively strong emergent interest in submarine cruises (the other being the Young Mainstream Market).

Percent Net Change in Those Planning to Do Activity in Next Two Years
Minus Those Having Done Activity in Past Two Years

Top Emergent Touring/Cruising Interests – Young Affluent Couples

Base: Percent of Population (184) Who Took a Trip in the Past Two Years and
Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)



The Young Affluent Couples also exhibited the strongest emergent touring interest in ocean cruises. Scenic day tours by train, overnight and day tours to wineries, and Great Lakes cruises were also emergent touring interests within this segment.

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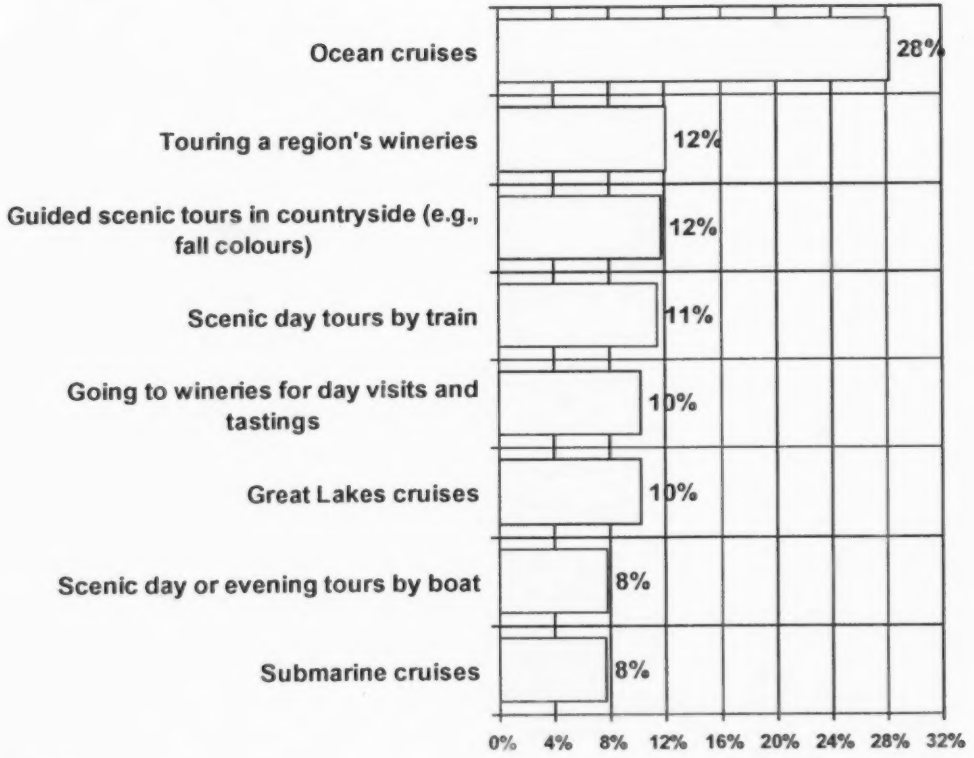
Travel Activities & Motivation Survey

TAMS: Emergent Vacation Interests

Percent Net Change in Those Planning to Do Activity in Next Two Years
Minus Those Having Done Activity in Past Two Years

Top Emergent Touring/Cruising Interests – Young Mainstream Market

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and
Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)

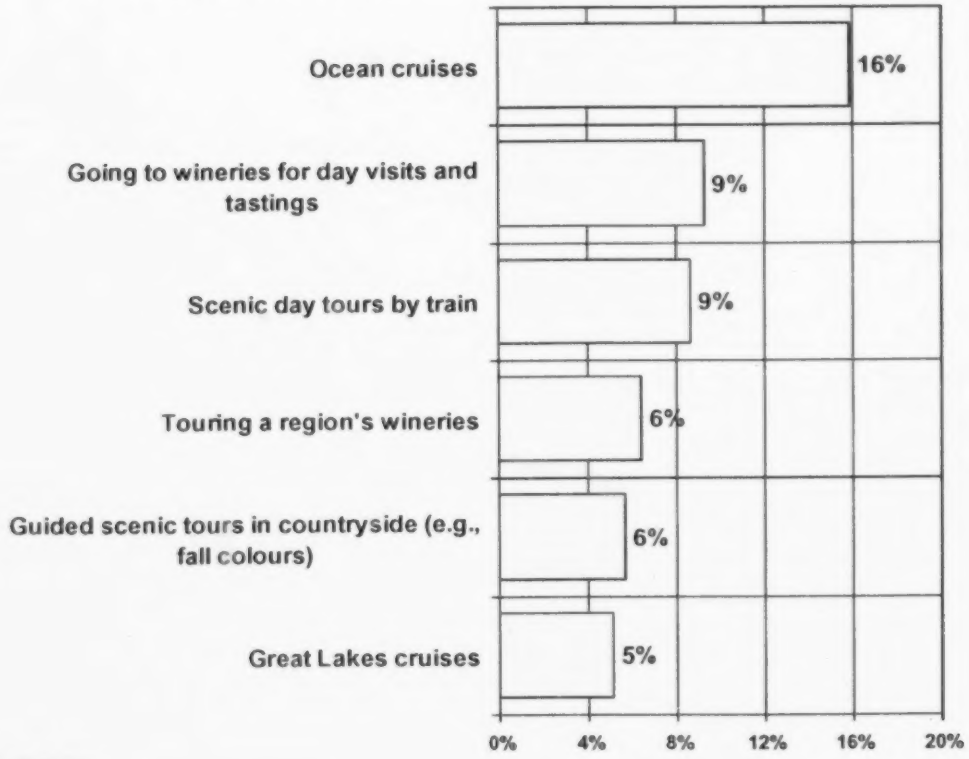


The Young Mainstream Market exhibited a very strong emergent interest in taking an ocean cruise. They also exhibited strong emergent interest in overnight and day tours to wineries, overnight scenic tours of the countryside, scenic day tours by train, and in Great Lakes cruises. The Young Mainstream Market was also one of two segments that exhibited a relatively strong emergent interest in submarine cruises (the other being the Affluent Young Singles).

Percent Net Change in Those Planning to Do Activity in Next Two Years
Minus Those Having Done Activity in Past Two Years

Top Emergent Touring/Cruising Interests – Affluent Families

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and
Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)



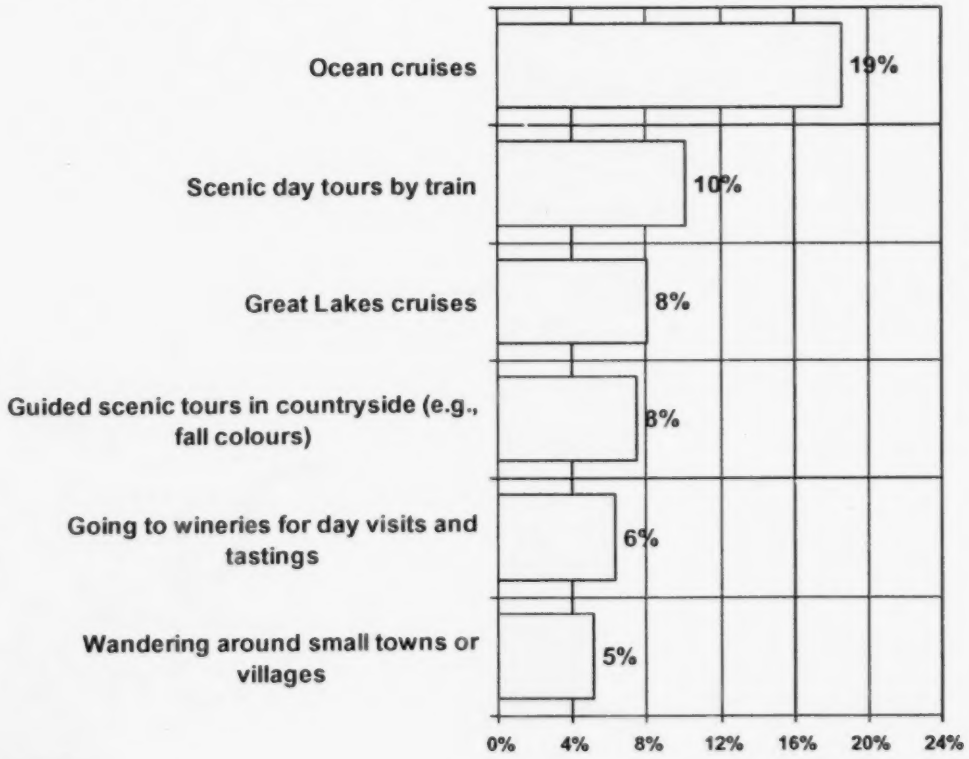
Affluent Families exhibited the strongest emergent touring interest for ocean cruises. They also exhibited emergent interests for overnight and day tours of wineries, scenic day tours by train, overnight scenic tours of the countryside, and Great Lakes cruises.

TAMS: Emergent Vacation Interests

Percent Net Change in Those Planning to Do Activity in Next Two Years
Minus Those Having Done Activity in Past Two Years

Top Emergent Touring/Cruising Interests – Mainstream Young Families

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and
Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)



Mainstream Young Families exhibited the strongest emergent touring interest for ocean cruises. They also exhibited emergent interest in scenic day tours by train, overnight scenic tours of the countryside, Great Lakes cruises, and overnight and day tours of wineries.

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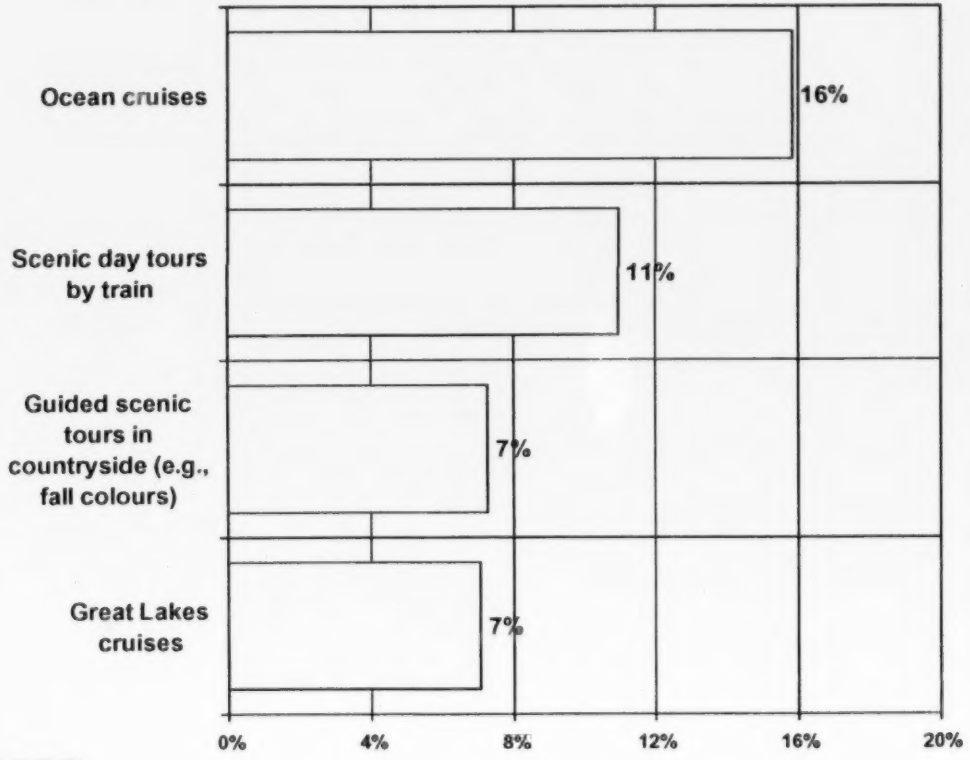
Travel Activities & Motivation Survey

TAMS: Emergent Vacation Interests

Percent Net Change in Those Planning to Do Activity in Next Two Years
Minus Those Having Done Activity in Past Two Years

Top Emergent Touring/Cruising Interests – Mainstream Mature Families

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and
Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)

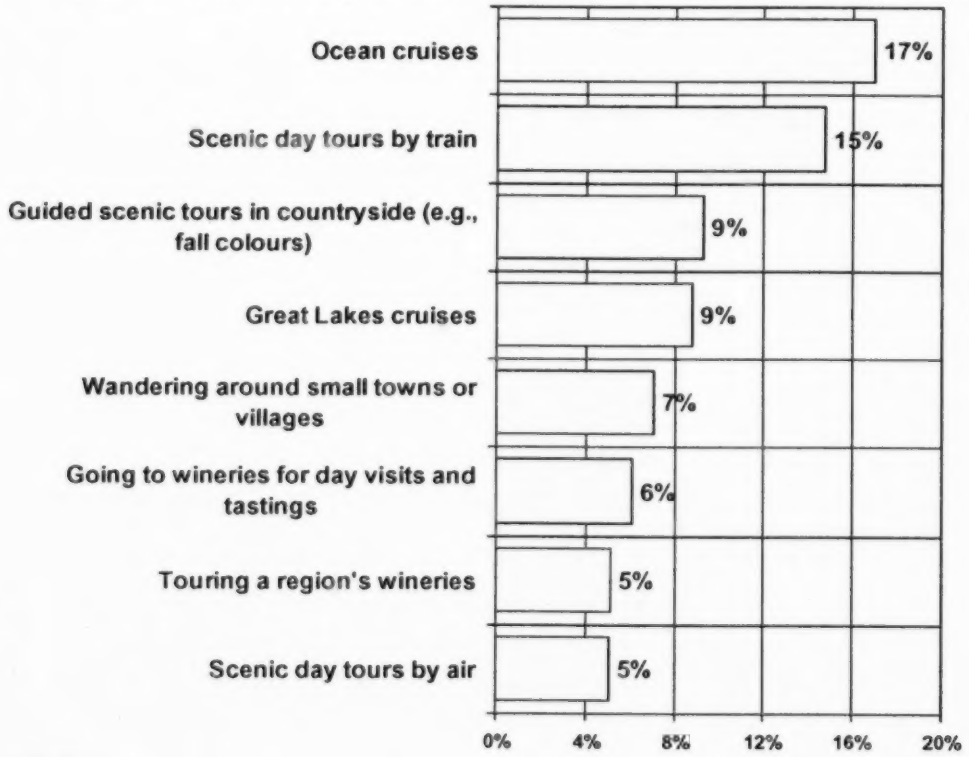


Mainstream Mature Families exhibited a pronounced emergent interest in only four of the 13 touring activities. As with other segments, their most apparent emergent touring interest was for ocean cruises. However, they also exhibited an interest in scenic day tours by train, overnight scenic tours of the countryside and Great Lakes cruises.

Percent Net Change in Those Planning to Do Activity in Next Two Years
Minus Those Having Done Activity in Past Two Years

Top Emergent Touring/Cruising Interests –Affluent Mature Singles

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and
Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)



Affluent Mature Singles exhibited an emergent interest in a broad array of touring activities, including ocean cruises, scenic day tours by train, overnight scenic tours of the countryside and Great Lakes cruises. They also were more likely than the Youth and Family segments to show an emergent interest in wandering around small towns or villages.

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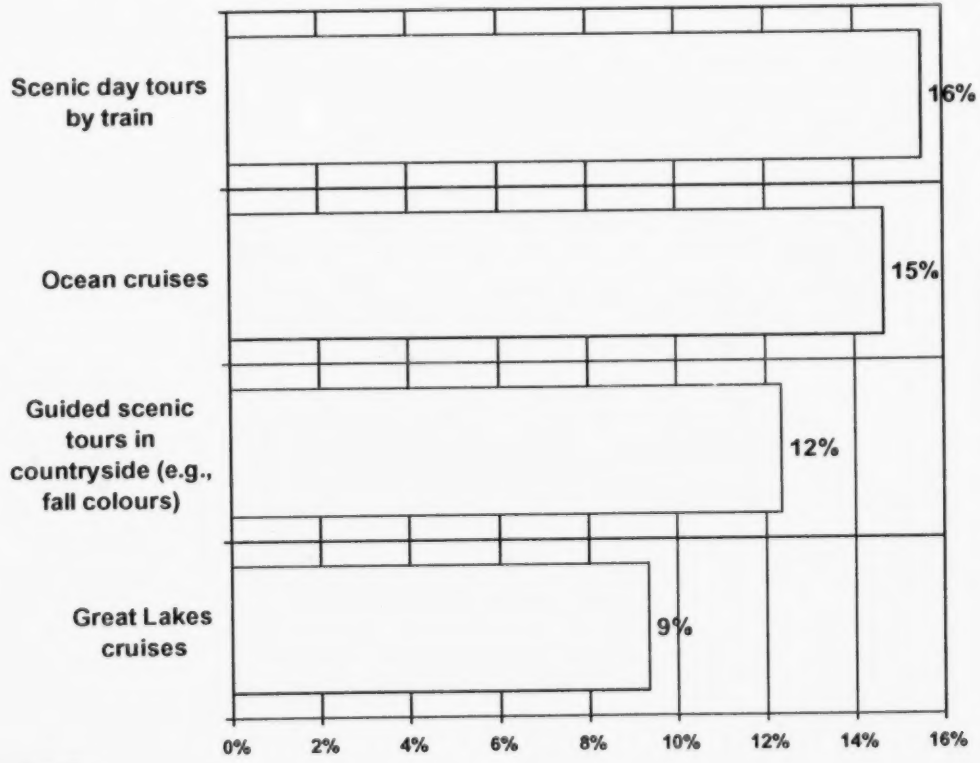
Travel Activities & Motivation Survey

TAMS: Emergent Vacation Interests

Percent Net Change in Those Planning to Do Activity in Next Two Years
Minus Those Having Done Activity in Past Two Years

Top Emergent Touring/Cruising Interests – Mainstream Mature Couples

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and
Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)

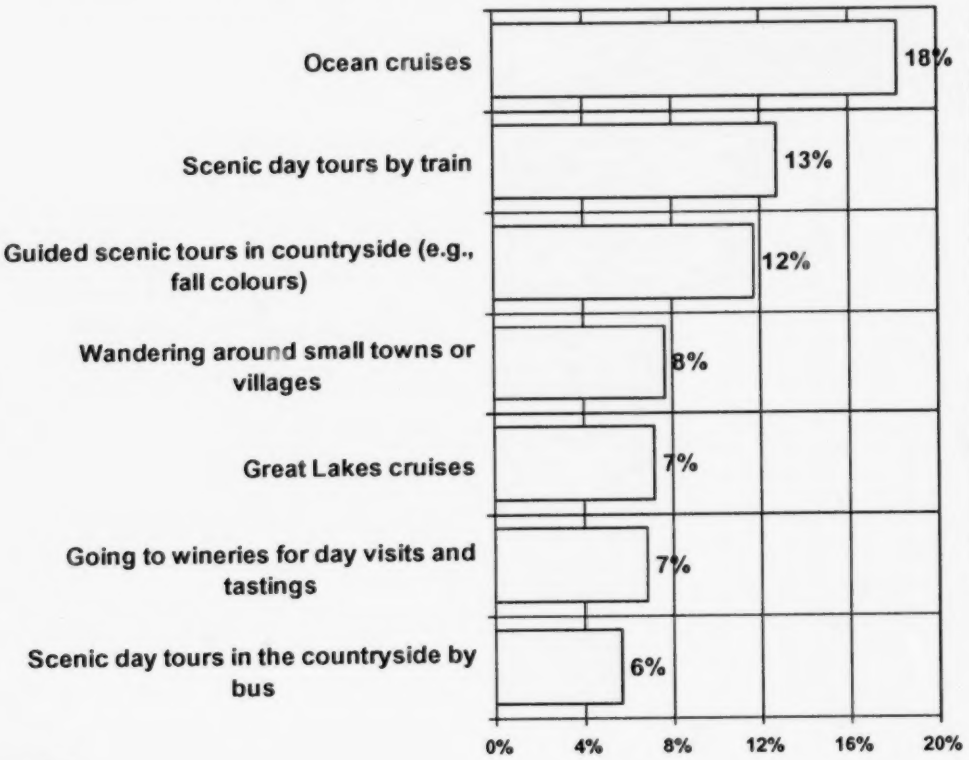


Mainstream Mature Couples exhibited a pronounced emergent interest in only four of the 13 touring activities: scenic day tours by train, ocean cruises, overnight scenic tours in the countryside and Great Lakes cruises. This pattern partially reflects the fact that travellers in this segment have often taken several types of tours during the past two years of travel, and therefore were less likely to identify tour types that they were expecting to take during the next two years that they had not already taken during the past two years.

Percent Net Change in Those Planning to Do Activity in Next Two Years
Minus Those Having Done Activity in Past Two Years

Top Emergent Touring/Cruising Interests – Mainstream Mature Singles

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and
Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)



Mainstream Mature Singles exhibited an emergent interest in seven of the 13 touring activities. Similar to other segments, they exhibited the most pronounced emergent interest in ocean cruises. However, this segment also exhibited considerable interest in scenic day tours by train and overnight scenic tours of the countryside. To a lesser extent, the Mainstream Mature Singles also displayed emergent interests in Great Lakes cruises, day visits to wineries, scenic day tours in the countryside by bus, and scenic day or evening boat tours. This segment was also one of two to exhibit an emergent interest in wandering around small towns or villages during the next two years of travel (the other being Affluent Mature Singles).

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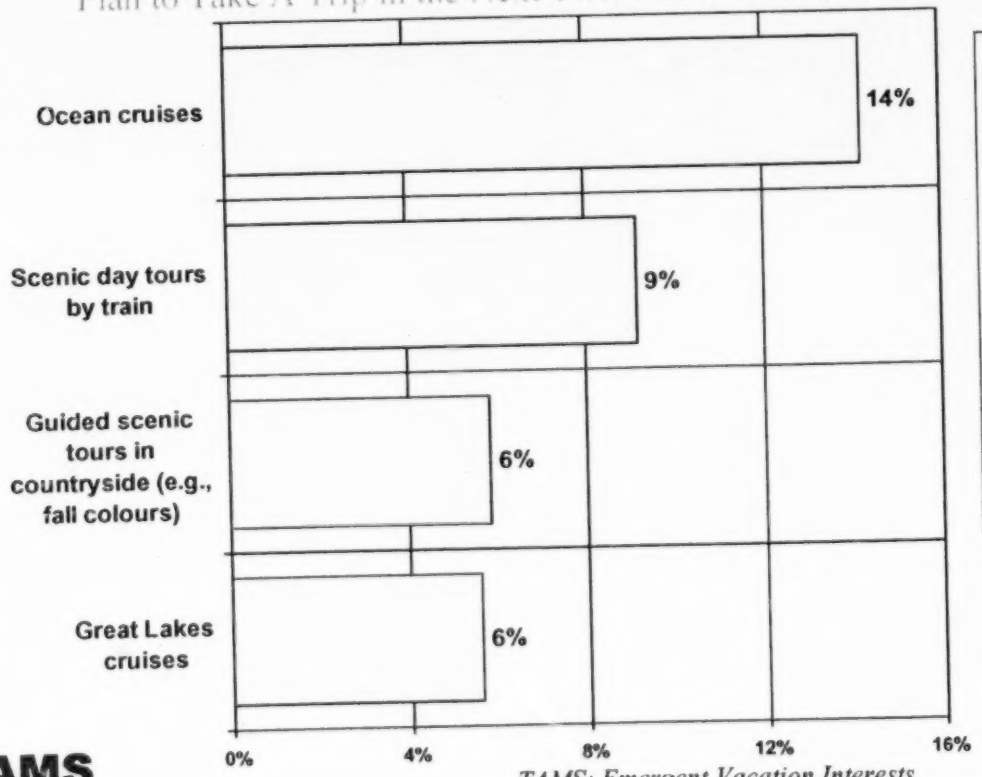
Travel Activities & Motivation Survey

TAMS: Emergent Vacation Interests

Percent Net Change in Those Planning to Do Activity in Next Two Years
Minus Those Having Done Activity in Past Two Years

Top Emergent Touring/Cruising Interests – Affluent Mature and Senior Couples

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)



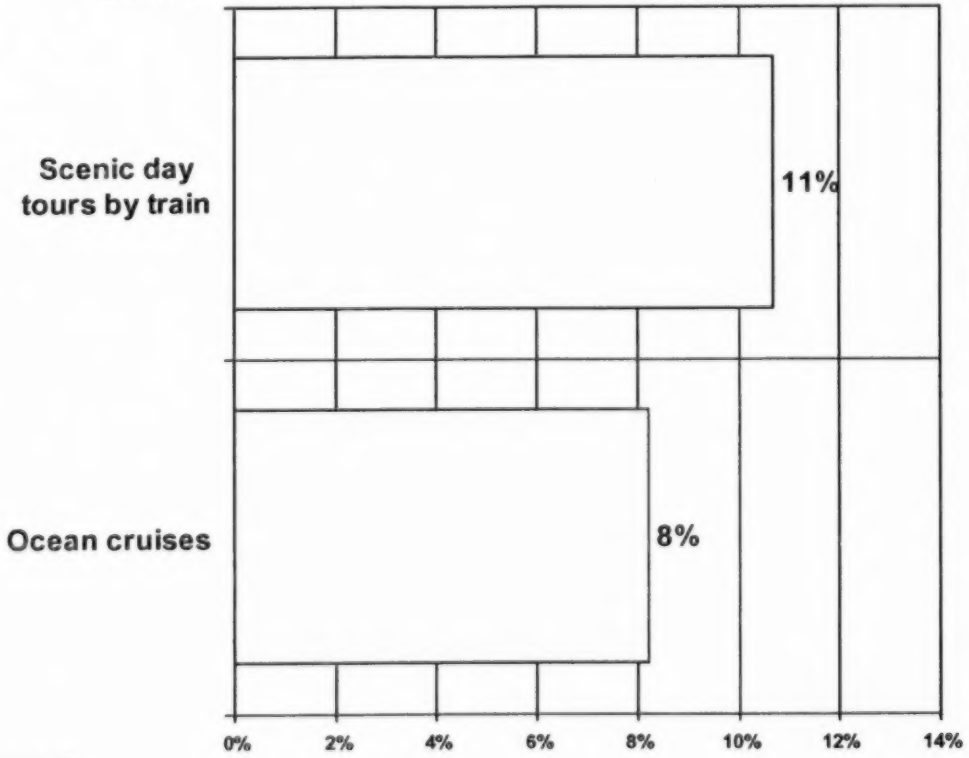
TAMS: Emergent Vacation Interests

Affluent Mature and Senior Couples exhibited an emergent interest in only four of the 13 touring activities. They showed the most pronounced emergent interest in ocean cruises, but also exhibited emergent interests in scenic day tours by trains, overnight scenic tours in the countryside, and Great Lakes cruises. This pattern partially reflects the fact that travellers in this segment have often taken several types of tours during the past two years of travel, and therefore were less likely to identify tour types that they were expecting to take during the next two years that they had not already taken during the past two years.

Percent Net Change in Those Planning to Do Activity in Next Two Years
Minus Those Having Done Activity in Past Two Years

Top Emergent Touring/Cruising Interests – Mainstream Senior Couples

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and
Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)



Mainstream Senior Couples were most likely to exhibit an emergent interest in scenic day tours by trains and in ocean cruises. Apart from this, they were unlikely to express intentions to take tours during the next two years of travel that they had not already had taken during the last two years.

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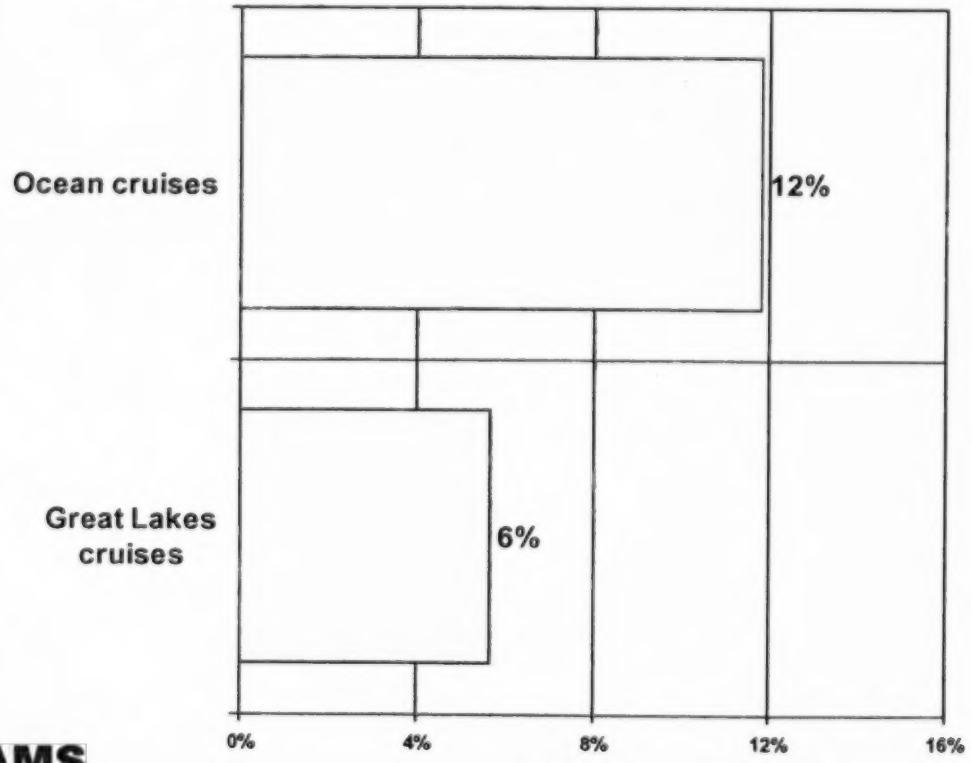
Travel Activities & Motivation Survey

TAMS: Emergent Vacation Interests

Percent Net Change in Those Planning to Do Activity in Next Two Years
Minus Those Having Done Activity in Past Two Years

Top Emergent Touring/Cruising Interests – Senior Singles

Base: Percent of Population (18+) Who Took a Trip in the Past Two Years and
Plan to Take A Trip in the Next Two Years: Canada and United States (Mailback Survey)



Senior Singles exhibited an emergent interest in only two of the 13 tour types – ocean cruises and Great Lakes cruises. Apart from this, Senior Singles exhibited little emergent interest in the other types of overnight or day touring activity.

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Travel Activities & Motivation Survey

TAMS: Emergent Vacation Interests